

# **CITY OF SALINA**

## **Market-Based Downtown Plan**

**APRIL, 2002**



**PREPARED FOR**  
**THE CITY OF SALINA**

**BY**  
**PROGRESSIVE URBAN MANAGEMENT ASSOCIATES, INC.**



# **City of Salina Market-Based Downtown Plan**

## **Part I: Competitive Analysis**

**Final Draft**  
April, 2002

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- A. Calculations for leakage analysis
- B. Tabulation from community attitudes survey
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## I. Plan Overview and Objectives

Located near the geographic center of the United States in east-central Kansas, Salina is a regional center for agriculture, commerce, health services and culture. Salina is preparing for the future by building upon its traditions of economic stability, attractive quality of life and strong community values.

Downtown is the historic hub of Salina's business community, with many structures remaining from the late nineteenth and early twentieth centuries. Downtown was formerly the community's retail center, but much of its traditional retail base has eroded since the 1980s with a new shopping mall and "big box" development to the south. Today, downtown remains a significant employment center anchored by City and County government, the Salina Regional Health Center and financial and professional service firms. Downtown is also a center for arts and culture, with established venues such as the Salina Community Theater, the Smoky Hill Museum and the Salina Arts Center. Additional vitality is anticipated from the restoration of the historic Fox Theater. A sprinkling of new retail, loft, restaurant and entertainment concepts have recently entered the downtown market, providing activity beyond the traditional 9 to 5 work day.

In 2002, downtown Salina is at a crossroads. While there is a sense of new momentum and a reawakening in the central business district, there is no clear unified vision steering downtown's future. The depth of the market for new retail and entertainment concepts is relatively unknown. Downtown is also increasingly important for community-wide business recruitment efforts, as skilled workers seek the cultural amenities and activities offered by a thriving central business district. To advance downtown development, management and marketing efforts, the City of Salina initiated the Downtown Market-Based Plan. Objectives of the Plan include:

- Create a downtown development plan and niche strategy that identifies market-driven opportunities to collaboratively improve, manage and sustain downtown Salina.
- Develop a distinct identity that strengthens downtown as a unique niche destination within the regional marketplace.
- Identify new business and development opportunities to improve downtown Salina's attraction as a destination and in a manner that enhances its existing character and sense of place.
- Strengthen and coordinate organizational marketing, business development and management programs for downtown.
- Engage downtown Salina property owners, businesses and civic leaders in a participatory process that builds "ownership" in and a shared vision for future development, collaborative marketing initiatives and improvements.

The final product of this process that was undertaken during the winter of 2001-2002 includes four documents:

- **Part I Competitive Analysis**, including an up-to-date economic profile, competition and retail leakage analysis, community attitude survey with more than 1,300 responses, the results from stakeholder interviews and forums, and conclusions for downtown and its position in the 2002 Salina marketplace.
- **Part II Niche and Development Strategies**, providing an overall niche strategy for downtown with guidelines for future development in several downtown "sub-districts".
- **Part III Implementation Recommendations**, offering suggestions for economic development, environmental improvements, marketing tactics, policies and incentives, organization and financing, including recommended sequencing, estimated costs and resources.
- **Part IV BID Organizational Assessment**, providing suggestions for refreshing the effectiveness and relevancy of downtown's business improvement district.

## II. Economic Profile

**Background.** Settlers drawn to the area's fertile soil founded the community of Salina, Kansas in 1858 along the Smoky River. A regional trade and cultural center, Salina is the largest city positioned near the geographic center of the United States, equidistantly located 1,490 miles from New York City and Los Angeles. The central intersection of the original town of Salina – Santa Fe and Iron Avenues is now considered to be in the north central part of the city.

An analysis of the demographic composition of neighborhood area residents and employees provides the most accurate description of the target markets that will be generating the demand for the business products and services in the area.

The following analysis is based upon recent data compiled by both a one and three-mile radius from the intersection of Iron Avenue and Santa Fe Avenue (Figure 1), and Census Tract 1, which contains Downtown Salina (Figure 2).

**Figure 1**  
**1 and 3-Mile Radii from Iron Avenue and Santa Fe Avenue**

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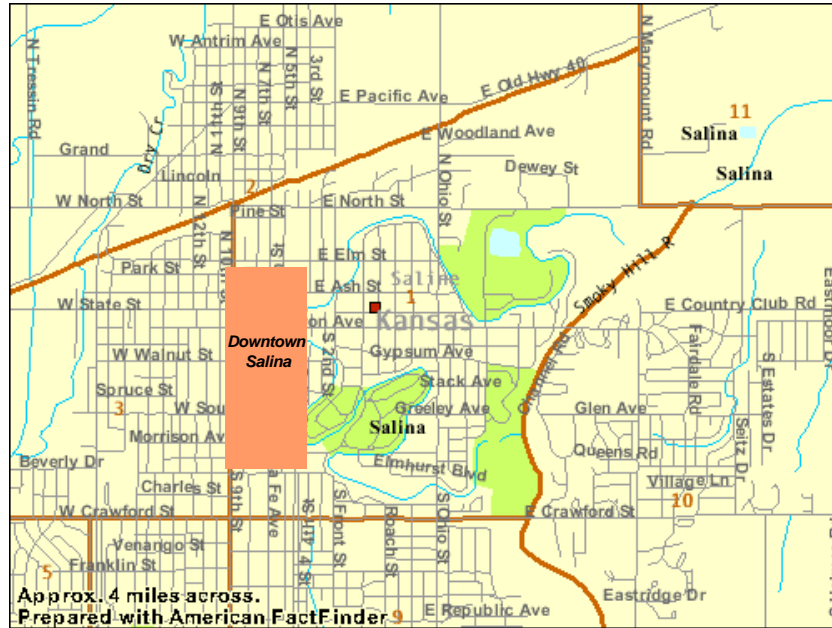


Downtown Salina is a 31-square block area roughly bounded by Elm, Third, Prescott and Ninth Streets.

**Figure 2**

**Downtown Salina, Kansas: Located in Census Tract 1**

source: 2000 Census



**Residents.** From 1990 to 2000 the average household size of 2.05 persons remained constant, while the number of households declined by 2.5 % in census tract 1, which contains the Downtown core. Citywide, population and households grew by over 7%, and household size remained at 2.4%. During the same time period, the Downtown-area population declined by 1.2% as many people moved to the eastern and southern areas of the City, which have experienced strong residential and commercial growth.

Within the Downtown area, the white population decreased by 5.6% between 1990 and 2000. African American, American Indian, Asian and Hispanic populations, which remain comparatively small, experienced some growth between 1990 and 2000, particularly Asians, American Indians and Hispanics within the Downtown area and citywide.

The 2000 Census places the median age at 37 within the Downtown area, and 35 for the City (Figure 3).

**Figure 3**  
**Demographic Summary: Downtown Area and City of Salina, 1990 - 2000**

source: 2000 Census

	Downtown Area			Salina		
	1990	2000	% Change	1990	2000	% Change
<b>Population</b>	5,848	5,778	-1.2%	42,303	45,679	+7.9%
<b>Households</b>	2,711	2,643	-2.5%	17,287	18,523	+7.1%
<b>Average Household Size</b>	2.05	2.05	0%	2.4	2.39	-0.42%
<b>Median Age*</b>	*	37.1	*	33.1	35.3	+6.6%
<b>Gender</b>						
Male	2,671	2,781	+4.1%	20,277	22,355	+10.2%
Female	3,117	2,997	-3.8%	22,026	23,324	+5.8%
<b>Race and Ethnicity</b>						
White	5,467	5,157	-5.6%	39,371	40,090	+1.8%
Black	217	262	+20.7%	1,500	1,630	+8.6%
American Indian	27	46	+70.4%	217	256	+17.9%
Asian & Pacific Islander	34	65	+91.2%	523	917	+75.3%
Other	103	131	+27.1%	692	1,728	+149.7%
<b>Hispanic Origin</b>	155	291	+87.7%	1,128	3,067	+171.9%

\*data not available

Figure 4 represents sales of single-family homes in Salina, with the wide majority of homes sold as detached. Most homes sold for less than \$90,000 between 1998 and August, 2001. Homes selling for more than \$250,000 represented less than 2% of all home sales during the same period. Median housing sale prices rose by 8.5% between 1999 and 2001. Much residential development has been underway in the eastern and southern portions of the City.

**Figure 4**  
**For Sale Housing Activity: 1998 - August, 2001**  
**Salina, Kansas**

source: National Association of Realtors

Period	Total Units Sold	\$90,000 to		\$140,000 to		Median Sale Price
		<\$90,000	\$90,000 to \$139,000	\$140,000 to \$249,000	>\$250,000	
<b>1998</b>	925	66.0%	23.4%	9.4%	1.1%	not available
<b>1999</b>	959	62.3%	24.3%	12.1%	1.2%	\$76,000
<b>2000</b>	890	61.3%	25.2%	11.5%	1.8%	\$77,500
<b>Thru 8/01</b>	594	56.5%	26.8%	15.3%	1.2%	\$82,750 (2001)

Apartment vacancy in the City has been in the 5% range for a number of years, rising to 7.3% according to the 2000 Census. An average monthly rental of a house ranges from \$350 to \$450 per month, while apartment rents range from \$350 to \$550 per month. 60.8% of Downtown housing stock are rentals, and citywide rentals account for 33.9% of housing.

source: Salina Board of Realtors, 2000 Census

The area population appears to be an educated one, approximately 20% having attended some college, and 22.5% having earned associates degrees or higher within the wider area. Kansas Wesleyan University and Kansas State University-Salina account for the majority of the college enrollments (Figure 5).

**Figure 5**  
**2000 School Enrollment\* and Education Levels**  
**1 and 3 Mile Radii from Iron Avenue and Santa Fe Avenue**

*source: 2001 Maps to Go*

	1 mile	3 mile
<b>Pre-Primary</b>	7.9%	9.0%
<b>Elementary and High</b>	69.5%	69.3%
<b>College</b>	22.6%	21.6%
<b>Total Enrollment</b>	2,292	8,508
<b>Education Levels 25+</b>		
<b>High School Graduates</b>	36.1%	36.7%
<b>Some College</b>	19.6%	21.6%
<b>Earned Degrees</b>	14.2%	22.5%

*\*public and private schools*

Median household incomes are noticeably lower within the core area, where more than 53% of households have annual incomes of less than \$25,000. 35% of households in the core area earn between \$25,000 and \$50,000. In the wider area, one-third of households earn less than \$25,000, one third of households earn \$25,000 to \$50,000 and one-third earn \$50,000 or more (Figure 6).

**Figure 6**  
**2000 Household Income by Percent of Total Households**  
**1 and 3 Mile Radii from Iron Avenue and Santa Fe Avenue**

*source: 2001 Maps To Go*

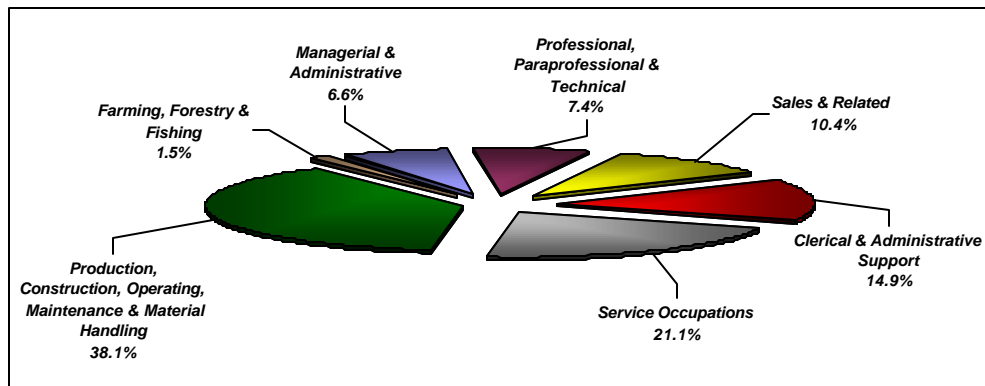
	1 mile	3 mile	Salina
<b>\$100,000 or More</b>	0.9%	6.9%	
<b>\$75,000 to \$99,999</b>	1.6%	6.9%	
<b>\$50,000 to \$74,999</b>	8.3%	19.9%	
<b>\$35,000 to \$49,999</b>	17.1%	18.0%	
<b>\$25,000 to \$34,999</b>	18.4%	15.1%	
<b>Less than \$25,000</b>	53.6%	33.1%	
<b>Median</b>	\$23,442	\$36,512	\$38,573
<b>Per Capita Income</b>	\$12,649	\$21,523	\$21,714



**Employment.** More than 2,400 retail and commercial businesses are located within the City of Salina, where the manufacturing sector has significant employment. Government, education, and health services are also major employers. 18,500 persons are employed within a three-mile radius of Downtown Salina. 46.4% of those workers are female, and more than 33% of this group has no children. 38% of workers within three miles of Downtown are employed in manufacturing, processing and construction, and 21% are service workers (Figure 7).

**Figure 7**  
**Population 16+ By Occupation**  
**3 Mile Radii from Iron Avenue and Santa Fe Avenue**

source: 2001 Maps to Go



**Downtown Marketplace.** Downtown Salina's "marketplace" is defined by those potential user groups, i.e. residents, employees and visitors that are found within the Downtown area at any given time (Figure 8).

**Figure 8: Downtown Salina's Marketplace 2000**

sources: various

Residents*	38,561
Employees*	18,490
College Students*	1,837
City & County Hall Visits	182,500 annually
Salina Public Library	240,000 annually
Salina Post Office	30,000 annually
Overnight Visitors (citywide)	400,000 annually
Hotel Room Nights (citywide)	300,000 annually
Convention/Meeting Attendance (citywide)	82,000 annually
Salina Regional Health Center Patient Visitations	100,000 annually
Salina Regional Health Center Admissions	10,973 discharged
Smoky Hill Museum	10,065 annually
Salina Community Theater	25,500 annually
Salina Art Center/Art Center Cinema	23,574 annually
Smoky Hill River Festival	80,000 annually
Salina Municipal Band	5,250 annually
Salina Downtown, Inc. Events	11,000 annually

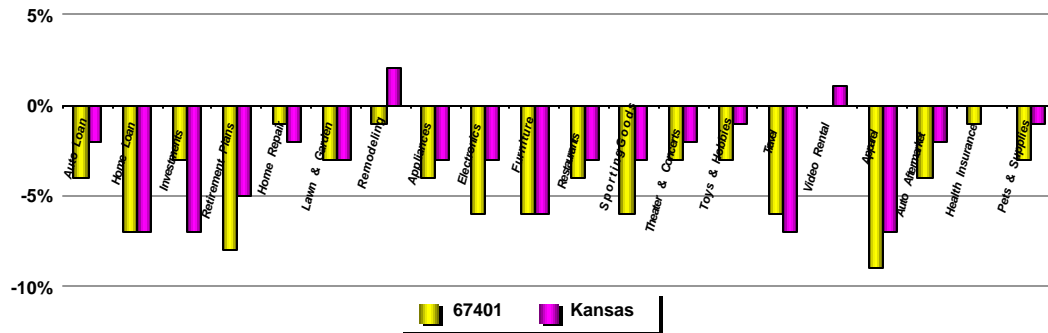
\*within a three mile radius of Iron Avenue and Santa Fe Avenue



**Spending Potential.** Figure 9 illustrates household spending potential for Salina, identified by the Salina zip code, 67401. The data suggests that Salina households spend less in almost all categories than the national standard, due possibly, to the aging population. Specifically, these residents appear to spend less on home loans, retirement plans, electronics, furniture, sporting goods, travel and apparel.

**Figure 9**  
**2000 Relative Spending Potential Indexes (x-axis = United States standard)**

source: 2000 CACI, Inc.

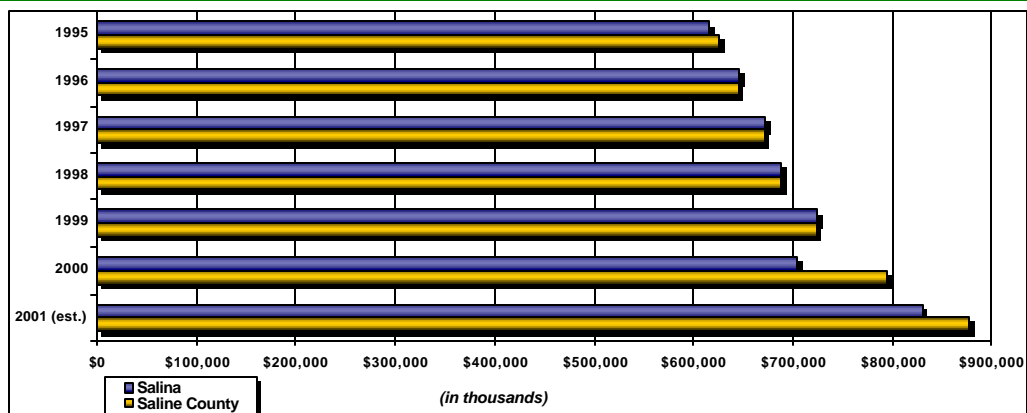


**Retail Sales** Salina is the regional trade center of a 24-county area, ranking third out of 18 Kansas cities for its “trade pull factor”, a measure of the relative retail trade strength of the business community. Salina has a pull factor of 1.64. Ranking first and second were Lenexa and Overland Park respectively, which are suburban Kansas City communities. A trade pull factor value greater than 1.00 indicates that the local businesses are capturing or pulling in trade from beyond their city borders. In 2000, the City of Salina had an approximate market share of Saline County retail sales of 88.5%. In 1995, Salina accounted for 98.3% of Saline County retail sales, growing to more than 100% of sales between 1996 and 1999. 2001 estimates indicate that Salina will capture 94.5% of retail sales in the county (Figure 10).

\*Kansas State University Extension

**Figure 10**  
**Annual Retail Sales: 1995 to 2001 - Salina and Saline County**

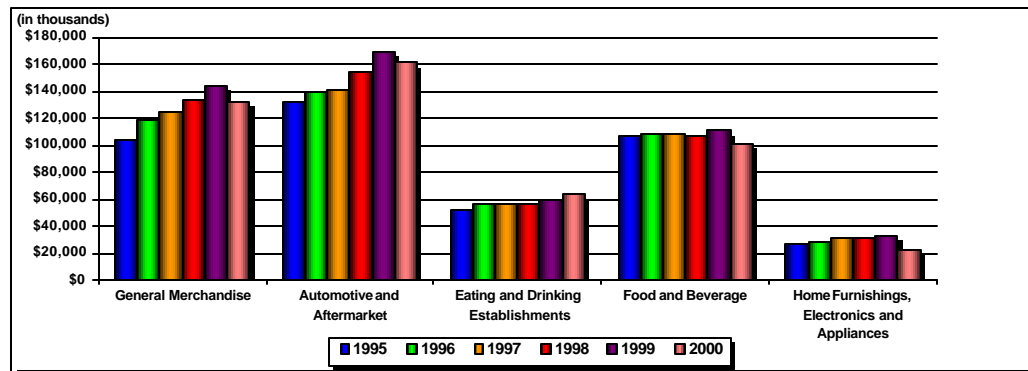
source: Sales & Marketing Management 2001 Survey of Buying Power



Motor vehicle sales and the automotive aftermarket, general merchandise and food and beverage sales account for most of the consumer spending in Salina. As Salina has such a major portion of Saline county market share, these trends are consistent on a county-wide basis, with the exception of 2000 and projected 2001 spending in restaurants and drinking establishments, and furniture, home furnishings, electronics and appliances, where spending was roughly 14% more than City sales (Figure 11).

**Figure 11: Annual Retail Sales by Category: 1995 to 2000 City of Salina**

source: Sales & Marketing Management 2001 Survey of Buying Power



Downtown Salina is a 31-square block area roughly bounded by Elm, Third, Prescott and Ninth Streets. The area contains more than 1.5 million square feet of total commercial space, including roughly 548,600 square feet of retail space. **A typical Downtown retail space is 2,750 sq ft. leasing between \$4.00 and \$8.00 per square foot with current retail vacancy estimated at 9.3%.** In addition to its being a government and office center, Downtown features a mix of more than 150 retail businesses, including specialty shops, services, and cultural facilities (Figure 12).

**Figure 12: Existing Retail in Downtown Salina**

sources: Salina Downtown, Inc., Salina Area Chamber of Commerce

Shopping	Quantity
General Merchandise	2
Food Stores	2
Automotive Dealers and Service Stations	5
Apparel and Accessories	9
Home Furniture and Furnishings	6
Eating & Drinking Places	18
Miscellaneous	
Bookstores	7
Floral/Gifts	7
Music Stores	3
Pet Stores	2
Jewelers	3
Antiques	14
Other Miscellaneous	9
<b>Retail Services</b>	
Auto Repair Services	6
Personal Services	17
Business Services	24
Recreation Services	3
Banks	8
Theaters and Entertainment	4
Museums and Galleries	3
<b>Total</b>	<b>152</b>

**Salina Traffic.** By studying traffic patterns in conjunction with nearby employment and retail centers, major transportation corridors in the area, and peak traffic times, it is possible to reveal additional commercial uses that may be supported simply by drive-by traffic.

Traffic counts were conducted by the City of Salina Engineering Department at the intersection of Santa Fe and Iron avenues during August, 1997. This intersection was the center of the original town of Salina, and is now considered to be in the north central part of the city. Counts reveal 24-hour volumes on each street of more than 13,000 cars daily (Figure 13).

**Figure 13**

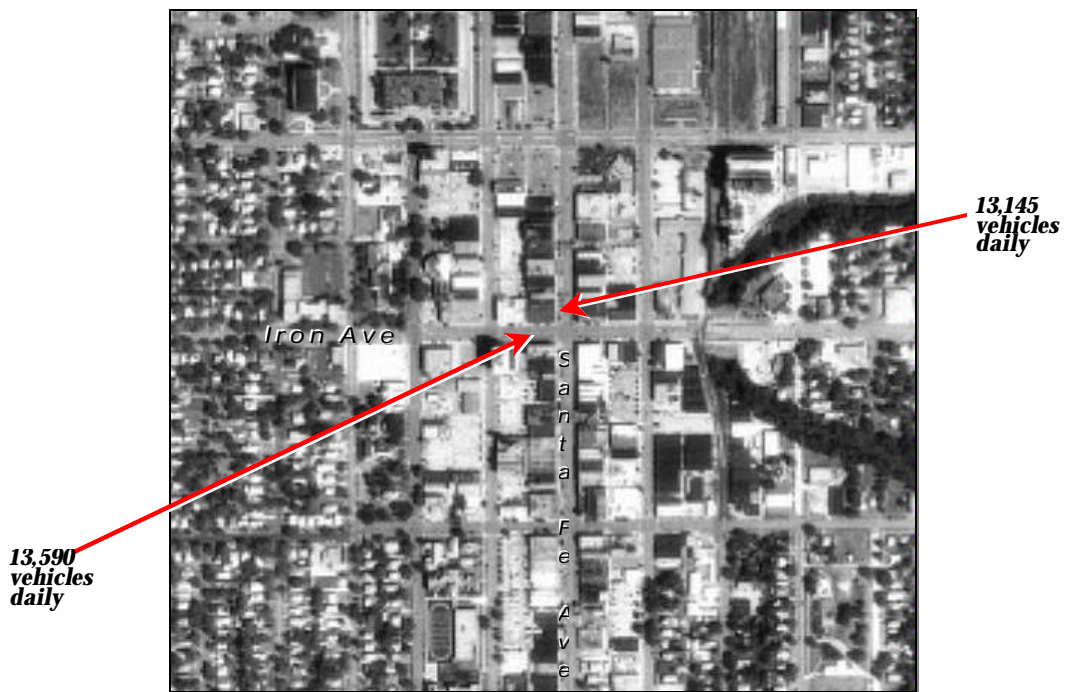
**Downtown Salina Traffic Analysis (counts taken August, 1997)**

*source: City of Salina Engineering Department*

<b>Iron Avenue @</b>	<b>Eastbound</b>	<b>Westbound</b>	<b>24-Hour Total</b>
<b>Santa Fe Avenue</b>	5,710	7,880	13,590

<b>Santa Fe Avenue @</b>	<b>Northbound</b>	<b>Southbound</b>	<b>24-Hour Total</b>
<b>Iron Avenue</b>	6,095	7,050	13,145



### III. Competition and Leakage Analysis

The preceding Economic Profile reveals a significant amount of demand for certain types of commercial uses, and it must be determined if that need is already being met within the trade area. Determining this for neighborhood commercial centers is difficult because of the small size of the market area and the confidential nature of some of the information necessary for a completely accurate analysis. For this reason, P.U.M.A. relies on primary field research as well as secondary information sources to evaluate the existing commercial supply.

**Supply of Commercial Space:** In November of 2001, P.U.M.A., with assistance from Kansas Wesleyan University students, undertook a field survey of existing commercial uses within both the primary and secondary market areas. The P.U.M.A. survey inventoried over 2.6 million square feet of retail space within the primary and secondary markets, which are defined by one- and three-mile radii from Iron Avenue and Santa Fe Avenue (Figure 16). The Summary Tables in the appendix provide a detailed breakdown of total square footage and existing retail usages in the seven retail nodes identified within the study area.

Within the one-mile primary market area, 938,000 square feet of retail space was surveyed. Retail space within the primary market is concentrated in Downtown Salina and the North Broadway Boulevard Corridor. Downtown Salina, which is Salina's original business district, offers a blend of specialty retail, commercial, service, cultural and government services. The North Broadway Boulevard corridor, which is the city's original bypass around the town's northwestern edge, offers discount and home improvement stores, restaurants and automotive supply businesses (Figure 14).

**Figure 14**  
**Concentration of Retail Space: Primary Market Area**

*source: P.U.M.A./KWU survey*

Retail Node	Retail Sq. Ft.	% of Market
<b>Downtown Salina</b>	548,600 sq.ft.	58.4%
<b>North Broadway Boulevard Corridor</b>	389,452 sq.ft.	41.6%
<b>Total Primary Market</b>	938,052 sq.ft.	

An additional 1.7 million square feet of retail space was surveyed in the three-mile secondary market, which is largely situated in the rapidly growing south and east sectors of the city. In this market, which excludes the primary market area, retail space is concentrated in the Interstate 70 and North Ninth Street area, and the South Ninth Street, Crawford Street and South Ohio Street corridors.

Galaxy Center is a strip center located directly across from the Central Mall, a regional center which features an eight-plex movie theater and three department stores as anchor tenants. Mid-State Plaza, built in 1971, and the new Wal-Mart store, are located just outside of the three-mile radius but are included in the analysis. Salina's first shopping mall was recently converted from an enclosed mall to a strip center. Mid-State Plaza anchor tenants include a home improvement store and a national hobby store.

The I-70/North Ninth retail node caters primarily to cross-country interstate traffic, featuring two truck stops, fast food restaurants and motels. Kraft Manor and Fountain Plaza are strip centers located along South Ninth Street. A big box office supply store recently ceased operations this node. The South Santa Fe Corridor features ethnic restaurants and specialty apparel shops located in a residential neighborhood just to the north of Kansas Wesleyan University.

The Crawford Street and South Ohio corridors are also strip centers offering supermarkets, restaurants, service and commercial outlets (Figure 15).

**Figure 15**  
**Concentration of Retail Space: Secondary Market Area, Excluding Primary Market Area**

*source: P.U.M.A./KWU survey*

Retail Node	Retail Sq. Ft.	% of Market
<b>Galaxy Center/Central Mall/Mid-State Plaza Area</b>	700,377 sq. ft.	41.1%
<b>I-70/North Ninth Street Corridor</b>	451,756 sq. ft.	26.5%
<b>South Santa Fe/Kraft Manor/Fountain Plaza Area</b>	192,530 sq. ft.	11.3%
<b>Crawford Street Corridor</b>	164,556 sq. ft.	9.7%
<b>South Ohio Corridor</b>	79,775 sq. ft.	4.7%
<b>Wal-Mart</b>	114,557 sq.ft.	6.7%
<b>Total Secondary Market</b>	1,703,551 sq. ft.	
<b>Total Primary and Secondary Markets</b>	<b>2,641,603 sq. ft.</b>	

**Vacancy:** The retail vacancy rate for the entire market area is 13.6%. The primary market area evidences a 7% vacancy rate. The secondary market, excluding the primary market, experiences an 17.2% vacancy rate, partially accounted for by a recently closed office supply big box and former automotive supply/repair businesses. Automotive aftermarket ranks fourth nationwide in a list of most frequently found previous tenants of vacant space in neighborhood centers. Drugstores, women's hair salons, medical and dental offices, restaurants without liquor and pizza parlors, in descending order, are other tenant types found in this category.\*

*\*source: ULI Dollars & Cents of Shopping Centers: 2000*

**Leakage Analysis.** Using the preceding fieldwork, industry average standards, and statistics on average household expenditures in the area, a retail sales leakage analysis was conducted in November, 2001, revealing that the three-mile area could support approximately 250,000 additional square feet of retail and storefront office. The summary tables in Appendix A provide the detail of this analysis.

Because of the necessity to use several different sources of data in an analysis such as this, there is bound to be error when the results are brought down to a detailed level. While it is dubious to claim that the exact amount of square footage assigned to each category, **it is possible to isolate distinct trends and general retail categories that are underserved in this market.**

Within the market area, there appears to be an over-supply of furniture and home furnishings stores, automotive aftermarket businesses and general merchandise.

The market appears balanced in the categories of apparel and accessories, drug stores, eating and drinking places, food stores and department stores. Discount stores, such as Wal-Mart and K Mart, are included in the department store category.

Retail types that appear to be underserved include:

- Automotive dealerships
- Home appliances, electronics including cellular phones and computer equipment.
- Hardware, lumber and garden stores

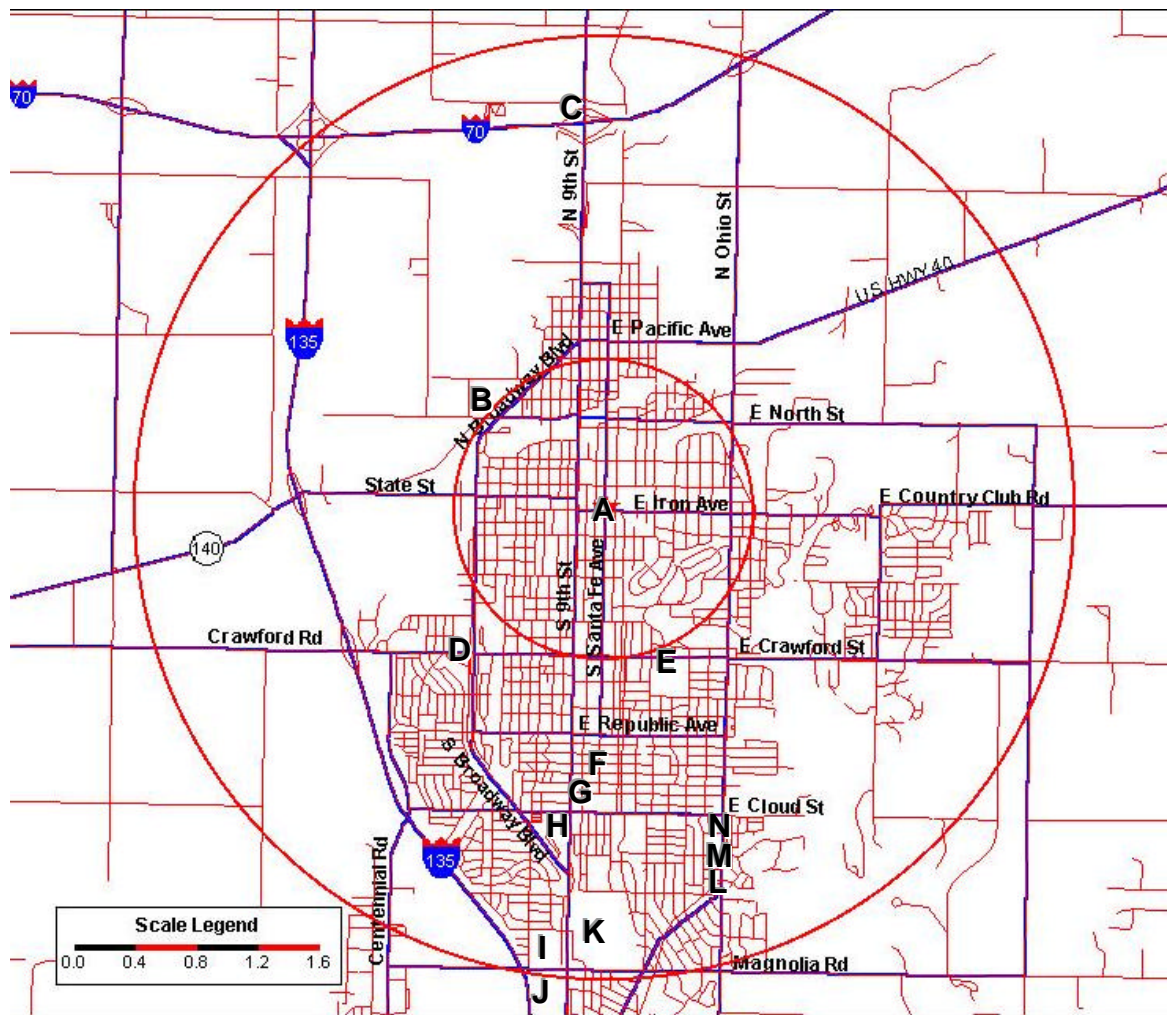
In addition to that which is mentioned above, information on consumer expenditures in several specific categories is lacking. These categories include, but are not limited to the general merchandise and the personal services categories.

**Leakage with “Pull Factor”:** The preceding analysis is based upon the Salina market without accounting for its regional “pull factor”. Pull factor is a measure of Salina as a retail destination, drawing customers from outside of the immediate community. A study by the Kansas State University Extension found that Salina has the third highest pull factor in the state at 1.64 (meaning that the city generates an additional 64% of sales from customers traveling to the city).

Applying the city's pull factor to the leakage analysis, several additional gaps are identified in the market, including:

- Apparel and accessories
- Eating and drinking places
- Home appliance, radio and television stores
- Department stores

These categories provide downtown with more traditional product types that can be serviced in the central business district. The analysis also demonstrates the importance of “pull factor” and the need to project to Salina's vast regional market.



**Figure 16: Competition & Leakage Analysis - Location of Surveyed Shopping Areas**

- A. Downtown Salina**
- B. Broadway Boulevard Corridor**
- C. I-70/North 9<sup>th</sup> Street Corridor**
- D. Sunset Plaza Shopping Area**
- E. Elmore Center**
- F. South Santa Fe Corridor**
- G. Kraft Manor**
- H. Hollywood Video/Fountain Plaza Area**
- I. Galaxy Center**
- J. Mid-State Plaza**
- K. Central Mall**
- L. Southgate Shopping Area**
- M. Oak Park Village**
- N. Parkwood Plaza**



## IV. Comparable Business Districts

The consultant team and the project steering committee identified five Salina business districts with which Downtown Salina competes as a center for retail and services. The comparable business districts identified include the Central Mall, the Southgate Shopping area, Mid-State Plaza, the Sunset Plaza Shopping Area and the South Santa Fe Corridor. With the exception of the South Santa Fe Corridor, the business districts are located adjacent to some of the most highly traveled intersections in Salina. A summary matrix of the comparable business districts is provided on the following page.

The comparable business districts have the following attributes:

- ◆ **Central Mall** - Located at the intersection of South Ninth and Magnolia streets, with easy access from Interstate 135, the Central Mall is a regional center, which features an eight-plex movie theater and three national department stores as anchor tenants. Built in 1987, the enclosed mall contains approximately 50 stores, including national apparel and accessory stores, specialty stores, restaurants and a food court, in addition to several stand-alone businesses.
- ◆ **Southgate Shopping area** – A cluster of three neighborhood shopping centers along South Ohio Street provide personal, financial and business services and retail to local customers. Businesses include a supermarket, a large independent menswear store, national chain fast food restaurants and local restaurants, a liquor store, a health food store, a national drug store, and a sporting goods store. One of the shopping centers contains a sizeable government and non-profit office component.
- ◆ **Mid-State Plaza** - Built in 1971, Salina's first shopping mall was recently converted from an enclosed mall to a strip center. Mid-State Plaza contains approximately 20 stores, and is located adjacent to the Central Mall. Anchor tenants include a local home improvement store and a national hobby store. A Food 4 Less supermarket recently vacated the center. Also occupying the center are a two-plex movie theater, a home décor store, national chain restaurants, an apparel store, a dollar store in addition to automotive, personal and financial service businesses.
- ◆ **Sunset Plaza Shopping Area** - Open since 1961, this shopping center has undergone a number of additions and a 1981 exterior renovation to a Spanish style. A Dillon supermarket anchors the center. Nearly one half of the tenants are restaurants, including national fast food chains. Two drug stores, furniture rental stores, automotive businesses, personal services, a national home electronics store, movie theater and a hardware store round out the remaining tenants.
- ◆ **South Santa Fe Corridor** – This business district occupies three blocks to the north of Kansas Wesleyan University in a residential neighborhood. Retail in this corridor supports the needs of the resident and student populations. An eclectic assortment of independent retailers includes ethnic restaurants, a metaphysical goods supplier, a pool hall/coffee shop, a natural foods store, pet shop, and apparel and personal services.

## Figure 17: Comparable Business Districts – Salina, Kansas

1/02 prepared by Progressive Urban Management Associates, Inc.

business district	niche	lease rate/ sq. ft.	pedestrian?	historic?	market	business mix
<b>Central Mall</b>	mid-priced destination retail and services (chains)	\$2 psf (department stores) - \$100 psf (specialty stores such as jewelers)	no	no	local/regional	moderately priced department stores, national clothiers/shoe stores, jewelers, movie theaters
<b>Southgate Shopping Area</b>	mid-priced neighborhood retail, services, offices	\$6 psf	no	no	local/regional	an independent menswear store, supermarket, national drug store, fast food restaurants, cosmetics store (chains) and services
<b>Mid-State Plaza</b>	neighborhood mid-priced retail, services and chain restaurants	\$2 - \$8 psf	no	no	regional	big boxes include a national hobby store, independent home remodeling stores, chain restaurants, banks, movie theater, florist, automotive and personal services
<b>Sunset Plaza Shopping Area</b>	neighborhood retail, services and chain restaurants	\$4.30 - \$9 psf	no	no	local/regional	national chain and other restaurants, supermarket, electronics, automotive, drugstores, hardware and personal services, movie theater
<b>South Santa Fe Corridor</b>	neighborhood retail and services	not available	yes	no	local	independent specialty retail and restaurants, neighborhood services

## V. Community Attitudes Survey

As part of the City of Salina Market-Based Downtown Plan, a direct mail survey was distributed to 5,476 Salina households as an insert in the November 2001 municipal water bill. Surveys were widely distributed throughout the City in 16 of the water department's 55 billing routes. 1,336 surveys were returned, representing a return rate of 24.4%.

**Profile of Survey Respondents:** Survey respondents were generally female (68%) residing in Salina south of Crawford Street (65%), and have been residents of Salina for more than 5 years (85%). Survey respondents represent an older demographic than the community at-large, with 56% of the responses from persons age 50 and older. Survey respondents are also more affluent than the community-at-large, with 51% reporting annual household incomes of more than \$50,000.

PROFILE OF SURVEY RESPONDENTS	All Respondents (%)
<b>Length of Residence in Salina</b>	
Less than 1 year	4
One to 5 years	11
More than 5 years	85
<b>Gender: Female</b>	<b>68</b>
<b>Age</b>	
18 to 34 years	15
35 to 49 years	29
50 to 69 years	37
More than 69 years	19
<b>Location of Residence</b>	
North of Crawford/East of Santa Fe	23
North of Crawford/West of Santa Fe	12
South of Crawford/East of Santa Fe	47
South of Crawford/West of Santa Fe	18
<b>Annual Household Income</b>	
Less than \$25,000	14
\$25,000 to \$34,999	19
\$35,000 to \$49,999	16
\$50,000 to \$74,999	28
More than \$75,000	23

**Frequency of Visits to Downtown:** 84% of respondents indicated that they visit downtown once a month or more and 54% visit downtown once a week or more. Only 4% indicated that they visit downtown once a year or less. This frequency of visitation suggests that downtown is relevant and familiar to the respondents of the survey.

Frequency of Visits to Downtown	All Respondents (%)
Once a week or more	54
About once a month	30
About four times per year	12
About once per year	3
Never	1

**Reasons for Visiting Downtown:** Top downtown attractions are shopping (61%), personal or business services (54%) and dining (50%). Downtown institutional uses are also notable attractions, including Salina Regional Health Center (39%), the city’s central library (38%) and city/county government offices (31%). Notably, church services (14%) drive similar visitation rates as special events (16%) and art galleries, museums and theaters (14%). “Other” responses included the post office, employment (i.e. respondents work in downtown), the recycling center and thrift stores.

<b>Reasons for Visiting Downtown</b>	<b>All Respondents (%)</b>
Shopping (i.e. apparel, gifts, books)	61
Personal or business services (i.e. hairdresser, bank)	54
Eating/drinking establishments	50
Salina Regional Health Center	39
Library	38
City/County business	31
Antiques and collectibles	17
Special events	16
Art galleries, museums and theaters	14
Church services	14
Other	12

**Reasons for Avoiding Downtown:** Respondents cite the lack of diverse retail as the top reason for avoiding downtown (50%). Also important are limited parking (31%), the lack of restaurant options (30%) and inconsistent hours of operation (28%). Downtown is considered safe and clean, with 4% registering concerns about safety and 4% noting that downtown lacks proper maintenance. “Other” responses for not visiting downtown include location (respondents live closer to other shopping areas), nothing of interest, lack of big box discount stores and high pricing.

<b>Reasons for Avoiding Downtown</b>	<b>All Respondents (%)</b>
Lack of diverse retail	50
Limited parking	31
Lack of restaurant options	30
Hours of operation (vary by business)	28
Other	19
Concerns about safety	4
Lack of maintenance (dirty sidewalks, graffiti, trash)	4
Lack of arts, cultural scene	2
Poor lighting/landscaping	1

**Other Business Districts Visited at Least Once a Month:** 83% of the respondents visit the Central Mall at least once a month. Other frequently visited retail destinations include the Southgate shopping area (60%), Mid State Plaza (43%), Sunset Plaza Shopping Area (41%) and Galaxy Center (40%).

Other Business Districts Visited at Least Once a Month	All Respondents (%)
Central Mall	83
Southgate Shopping Area	60
Mid State Plaza	43
Sunset Plaza Shopping Area	41
Galaxy Center	40
Kraft Manor Area	20
South Santa Fe Shopping Area	10
Other	10
Fountain Plaza Shopping Area	8

**Improvements That Would Encourage Visits to Downtown:** More diversity in shopping and retail services (45%) and more diversity in restaurants (42%) were the top two improvements that would encourage respondents to visit downtown. Notably, 27% indicated that better information on what exists would also encourage visitation. “Other” improvements included a central gathering spot and keeping stores open at night.

Improvements That Would Encourage Visits to Downtown	All Respondents (%)
More diversity in shopping/retail services	45
More diversity in restaurants	42
Better information on what exists	27
Overall consistency in hours/days of operation	18
Other	16
Nothing! Leave it alone!	14
Family-oriented entertainment	13
Special events	8
More arts and cultural outlets	7

Open-ended suggestions were sought for improvements in the restaurant, retail and arts and culture categories, with the following responses:

- **Retail:** Apparel, ladies apparel, department stores, specialty stores including kitchen/gourmet shops, fabric and crafts, shoes, gifts, books, home improvement and décor, toy/hobby store, sporting/athletic goods.
- **Restaurants:** Family style, Mexican, “ethnic” (other than Mexican), upscale (Capers and Martinelli’s were frequently mentioned as prototypes), local and original, deli/lunch/breakfast.
- **Arts & Culture:** Movie theater, live music/comedy/jazz club, many comments in anticipation of the Fox, reasonably-priced entertainment, outdoor music concerts, orientation to children.

**Survey Cross-Tabs:** Results from the Community Attitudes Survey were cross-tabulated to identify respondent preferences and patterns by age, gender and income. Results from the cross-tabs include:

### **Age**

- Younger respondents (18 to 34) visit downtown most frequently (56% once a week or more).
- Younger respondents (18 to 34) indicated that they visit downtown to shop (59%) yet the same age group avoids downtown due to a lack of diverse retail (58%).
- Respondents in the 35 to 49 age group are the strongest shoppers (64%). This group is also the strongest patron of the Central Mall (89%).
- Respondents in the 50 to 69 age group visit most for personal and business services (64%).
- Respondents over age 69 are most concerned with limited parking (39%).
- To improve downtown, the 18-34 age group would like to see more retail (49%), the 35-49 age group is seeking more diversity in restaurants (44%) and the over 69 group would like more information on what exists (38%).
- To improve downtown, 27% of the 50 to 69 age group responded "Nothing! Leave it alone!"

### **Gender**

- Males visit downtown more frequently than females. (60% of males visit once a week or more versus 51% for females)
- Males visit for personal or business services (57%), followed by eating/drinking (50%) and shopping (48%). Females visit for shopping (67%), followed by personal or business services (52%) and eating/drinking (51%).
- To improve downtown, males want restaurants (46%) and shopping (38%), while females want shopping (48%) and restaurants (39%).

### **Income**

- Households with higher incomes (over \$50,000) visit downtown more frequently (57% visit once a week or more) than households with lower incomes (51% of those with less than \$50,000 visit once a week or more).
- Eating and drinking establishments are a stronger draw for higher income households (60% of those over \$50,000) than lower income households (42% of those under \$50,000). All remaining categories provide stronger reasons for downtown visitation by higher income households with the exception of personal and business services, church services and the Salina Regional Health Center.
- Higher income households visit the Southeast Shopping Areas more (71% vs. 48%) and the Sunset Plaza Shopping Area less (31% vs. 53%)
- To improve downtown, higher income households would like more restaurants (50%) and retail (49%) while lower income households are seeking more retail (41%), better information (34%) and restaurants(33%).

## VI. Stakeholder Perspectives

To validate market research and obtain a qualitative sense of downtown Salina's overall challenges and opportunities, the consultant team conducted a comprehensive community outreach process that included more than 40 one-on-one meetings. More than 75 stakeholders participated in a series of five interactive workshops with different business and community groups.

In addition, the planning process was guided by a sixteen-member Steering Committee that included a broad representation of downtown business and property owners, retailers, residents, arts community members and City officials. A roster of the Steering Committee is provided in the Appendix. Results from the community outreach process follow.

**One-On-One Interviews:** More than 40 one-on-one interviews were conducted with downtown stakeholders to obtain a perspective on downtown Salina's primary challenges, opportunities and issues. Interviewees included:

1. Janda Allred, Blue Stem Art Gallery
2. Tom Bell, The Salina Journal
3. Judy Brangman, Director, Salina Neighborhood Services
4. Chuck Carroll, Carroll's Hallmark
5. Dennis Collier, developer
6. Gerald Cook, Salina Chamber of Commerce
7. Brance Crawford, Executive Director, The City
8. Wayne DeBay, SDI Chairman & The Flower Nook
9. Warren Ediger, Warren Ediger Architects
10. Ben and Lavelle Frick, The Phoenix
11. Diana Gay, The City
12. Murray Gorman, Capers Café and Bakery
13. Dee Harris, Museum Director, Smoky Hill Museum
14. Mark Henson, Medina Construction
15. Jack Hinnenkamp, Salina Regional Health Center
16. Chris Hoffman, UMB Bank
17. David Jenkins, Executive Director, Fox Theatre
18. Alan Jilka, City Commissioner/Jilka Furniture
19. Dennis Kissinger, City Manager, City of Salina
20. Ann Knowles and Leslie Knowles Bishop, Uniglobe Knowles Travel
21. Rusty Leister, The Groove
22. Melinda Lingle, Salina Downtown Inc.
23. Judy McClintock, Brown Mackie College
24. Jim Maes, Blue Beacon
25. Al Mattson, Budget Books
26. Mike Morgan, Deputy City Manager, City of Salina
27. Wendy Moshier, Salina Art Center
28. Rodney Nitz, Attorney
29. Rob Peters
30. Randy Peterson, SRHC
31. David Petty, Martha & David's Boutique
32. Jim Ravenkamp, General Air/BID Chairman
33. Martha Rhea, Executive Director, The Salina Arts & Humanities Commission
34. Steve Ryan, Ryan Mortuary
35. Monte Shadwick, City Commissioner/The Paramount Bar
36. Marc Sheforen, Acoustic Sounds/Blue Heaven Studios
37. Heather Smith, Salina Art Center
38. Mike Soaetart, Public Information Coordinator, Unified School District
39. Michael Spicer, Salina Community Theater
40. Gary Stansberry, Blueprint & Micrographics Business
41. Paula Wright, Clark, Mize & Linville



Listed below are the most frequently mentioned themes and sentiments about downtown Salina that emerged from the one-on-one interviews.

- **Improve Street Appeal** – Almost unanimously expressed by downtown stakeholders is a desire for cleaner streets. Soiling of sidewalks by pigeons is an ongoing nuisance. There also seems to be a prevailing sense that the existing streetscape, which was reconstructed in 1987, is inconsistent in its design and does not convey a unified sense of place. A more consistent and updated streetscape design, better use of public spaces (the pocket parks are underutilized) should be integrated in the streetscape more effectively. Public art was also frequently mentioned as a way to help provide downtown with some style and definition.
- **Install Directional Signage/Wayfinding** – There is unanimous support for a well-designed signage and wayfinding program that extends from the interstates to downtown. A common complaint is people coming in from either highway don't know if or when they've actually reached downtown. A comprehensive signage program could also direct motorists to parking and pedestrian destinations through downtown.
- **Diversify the retail mix** – A frequently mentioned improvement is more retail and restaurant options – particularly specialty retail and “white tablecloth” restaurants. Also mentioned is a desire for neighborhood retail such as a small grocery, pharmacy, kitchen store, and a wider variety of night life, including live music.
- **Create an Arts & Entertainment District** - The potential for an arts and entertainment district seems to be foremost on many stakeholders' minds. The Fox, the Salina Community Theater, and the Salina Arts Center create a critical mass to spearhead the foundation for a thriving arts district. There is a lot of enthusiasm and opportunity to move forward this concept.
- **Restructure the BID** – Many business owners expressed dissatisfaction with the Business Improvement District. The most frequent concerns include: The BID is viewed as regulatory, not supportive; It forces participation without consent; There are too many committees within the BID – it needs to be streamlined; The BID needs to demonstrate its benefits more clearly; It has lost its relevance.
- **Revamp SDI** – Many interviewees feel SDI's current role is unclear in relation to the City, Chamber and Arts & Humanities Council. There is a feeling among business owners that SDI's volunteer focus creates limitations and inefficiencies. Some business owners indicated they'd like to see SDI serve an economic development role taking on such tasks as maintaining a database of available properties, business recruitment and marketing.
- **Create Effective Special Events** – Several people interviewed indicated they feel there should be a signature downtown special event. There is a sentiment that Santa Fe Days should be either revamped or eliminated. Also mentioned was a lack of corporate sponsorship for special events.

- **Lack of Incentives** –Business and property owners mentioned a desire to improve or restore building facades but aren't clear about the availability of financial incentives. One business that left downtown mentioned they would have considered staying had there been some incentive to do so.
- **Inexpensive Real Estate** – The relative affordability of downtown real estate was mentioned as one of downtown's assets as well as its healthy inventory of historic buildings. Also mentioned was a need for more live/work artist space and more downtown loft development.

**Focus Groups:** Five focus groups were conducted with a variety of downtown stakeholders. Focus group participants discussed the strengths and weaknesses of downtown Salina, identified suggested improvements and prioritized potential enhancements. Focus groups were held on the following dates:

- October 23, 2001– Downtown arts/entertainment district committee (20 participants)
- October 24, 2001– SDI Committee Chairs (15 participants)
- October 25, 2001 – Market-Based Plan Steering Committee (15 participants)
- November 28, 2001 – SDI sponsored downtown community forum held at the Salina Community Theatre (20 participants)
- November 29, 2001 – Chamber Forum with non-downtown business owners (10 participants)

**Downtown Salina Strengths and Weaknesses:** Focus group participants were asked to list what they considered downtown Salina's strengths and weaknesses. General findings from the focus groups include:

- **Downtown Salina's strengths** include its potential to become an arts and entertainment district, its unique and historic atmosphere, its location near two interstate highways and its proximity to two employment centers – the City office complex and Salina Regional Health Center, and enthusiasm for its revitalization from both the City and the community at large.
- **Downtown Salina's weaknesses** include its deteriorating physical appearance, lack of common vision for its future, inadequate signage and directories, inconsistent operating hours, poor maintenance and a weak retail and restaurant mix.

The matrix on the following page outlines the findings of the focus groups.

<b>DOWNTOWN SALINA STRENGTHS</b>	<b>SDI Oct 24</b>	<b>Arts Oct 23</b>	<b>S/C Oct 25</b>	<b>Chamber Nov 29</b>	<b>SCT Nov 28</b>
Seeds for Arts & Entertainment District	x	x	x	x	x
History & Architecture	x	x	x		x
Main Street Atmosphere	x	x	x	x	
Safe & Attractive	x	x	x		x
Pedestrian Friendly	x	x	x	x	
Density	x	x	x	x	
Unique Character	x	x	x	x	
Loft Potential		x	x		x
Anchors - City Complex and SRHC	x				x
City, County Gov; Professional Base	x				x
Crossroads Location	x				x
Many Banks				x	x
Community Passion		x	x		
New Business Opportunities	x		x		
Momentum			x	x	
City Support	x				x
Main Street, SDI	x				
Few Vacancies				x	
Sound infrastructure		x			
The Fox				x	
Unique Retail, Restaurants					x
Many Churches					x
Teen Center					x

<b>DOWNTOWN SALINA WEAKNESSES</b>	<b>SDI Oct 24</b>	<b>Arts Oct 23</b>	<b>S/C Oct 25</b>	<b>Chamber Nov 29</b>	<b>SCT Nov 28</b>
Deteriorating Storefronts/Absentee Landlords	x	x	x	x	x
Lack of Identity-No Common Vision	x		x	x	x
Need Signage & Directory			x	x	x
Bad Access From Highway	x			x	x
Inconsistent Shop Hours			x	x	x
Weak Retail & Restaurant Mix	x		x		x
Poor Maintenance			x	x	x
Perception Downtown Closes @ 5:30	x	x			
Complaints About Bars		x	x		
Poor Streetscape			x	x	
Lack of Parking				x	x
Real Estate Costs Increasing		x			
Limited Affordable Housing		x			
Gentrifying Too Quickly		x			
Limited Vacancies	x				
Too Many Non-Profits					x
BID Assessment					x
Inconsistent Business Incentives					x

Some of the most frequently mentioned **areas of enhancement** for downtown Salina in order of importance as indicated by the focus groups are:

- Downtown lacks a common vision and the leadership necessary to achieve a common goal.
- Downtown is lacking a healthy variety of unique retail and restaurants.
- Directional signage and wayfinding systems are greatly needed to guide pedestrians and motorists downtown.
- There needs to be consistent streetscaping and a design plan to enhance downtown's sense of place and identity.
- Maintenance and upkeep of downtown spaces is inadequate.

The matrix below summarizes improvements for downtown Salina.

**Improvements for Downtown Salina by group surveyed and number of responses given.**

<b>GROUP/# OF RESPONSES</b>	<b>SDI</b>	<b>Arts</b>	<b>S/C</b>	<b>Chamber</b>	<b>SCT</b>
Common vision/strong leadership	5	7	7	4	14
Unique retail shops	4	5	3		8
Improve gateways, directional signage	3		1	4	3
Public art/consistent design/landscape/lighting		5		4	5
Pigeons, cleanliness, maintain/upgrade facades	3			1	4
Incentives to encourage downtown investment			7		2
Night activity/more upscale restaurants		6			4
Improve access/roadway improvements		4	2		
Create arts district					11
Destination retail anchors			4		
Build hotels, B&B's			3		
More activities/events - simple & consistent				3	
Develop partnerships with banks				3	
Fill/fix vacant buildings - create mill district				2	
Re-use of Roosevelt/Lincoln, Phoenix & Bartlett	2				
Restructure assessments					2
Engage, involve property owners, more unity					2
Loft/residential development			1		2
Attractive gathering places			1		
Key development sites (Ash & Santa Fe)			1		
Move recycling center	1				
Open air pedestrian environment					
Affordable downtown living					
Perceived lack of parking					

**Stakeholder Conclusions:** Several common themes emerged from the one-on-one interviews and the focus groups. Themes that prevailed in both forums include:

- Downtown Salina is drifting. It needs a common vision, clarity and strong leadership before it can begin to make meaningful changes.
- Downtown has all the raw materials for a thriving commercial district – unique historic buildings, a pedestrian-friendly scale, a growing number of unique retail opportunities, very low crime, a strong sense of community and a sound infrastructure.
- Downtown is anchored by two thriving employment centers: the City/County office complex to its north and Salina Regional Health Center to its south. These markets provide excellent opportunities for supporting restaurant and retail options in the downtown commercial area.
- There are several redevelopment opportunities near downtown such as Bartlett Elementary School, Lincoln/Roosevelt High School as well as historic warehouses and mills.
- Salina has a rich arts community that could be the basis for a *regional* arts and entertainment district. One arts champion we interviewed said “the artist is Salina’s most valuable raw material” and that the City has played a crucial and “enlightened” role in fostering the arts in Salina.

## **VII. Conclusions:**

### **Downtown Salina and the Marketplace in 2002**

Based upon the findings of the preceding competitive analysis, the following notable conclusions can be drawn about downtown and its position in the Salina marketplace in 2002:

- 1. Salina is a stable, predictable and conservative market.**  
The economic profile describes a community that exhibits stability in population, growth and employment. A majority of Salina residents are employed in manufacturing, processing, construction and services -- vocations that have been insulated from dramatic economic changes in the national economy. Incomes are consistent with national norms, but spending is more conservative – Salina residents tend to spend less than both Kansas and national averages in most retail and service categories.
- 2. Salina's retail market is balanced.**  
We found Salina's retail market to be in relative balance – most retail categories are either overbuilt (reflecting Salina's regional importance and a surplus of "big box" development) or near equilibrium. Retail categories that benefit downtown are revealed after adjusting for Salina's regional "pull factor". The retail leakage analysis suggests that downtown will need to compete for retail by delivering a superior and different product, as opposed to filling market gaps, and will need to be cognizant of Salina's regional draw in marketing efforts.
- 3. Downtown remains a significant regional attraction.**  
Despite downtown's erosion in the retail sector over the past 15 years, the central business district remains a significant regional attraction. Our sampling of select downtown institutions, events and cultural attractions identified more than 675,000 visits on an annual basis. Many of these visits are from persons residing outside of Salina, attracted to regional service facilities. In addition to shops, services and restaurants, downtown's primary activity generators include the Salina Regional Health Center, central library and city and county government offices.
- 4. Downtown is relevant to the locals.**  
The community attitude survey revealed a striking loyalty and familiarity with downtown by Salina residents. 84% of respondents stated that they visit downtown once a month or more and 54% indicated that they visit the central business district once a week or more. Reasons for visiting downtown are many and varied. Shopping, services and dining are the most popular, followed by visits to key downtown government and health institutions. Church services drive as many visits as art galleries, theaters, museums and special events.
- 5. Arts and culture provide the sizzle, NOT the steak.**  
While downtown is home to an impressive array of arts and cultural institutions, these uses alone will not revitalize downtown Salina. The community attitudes survey suggests that arts and cultural uses currently drive a small segment of downtown visitations and they rank as a low priority improvement. Salina residents will respond to a "meat and potatoes" diet of more diversity in shopping and dining, while the emerging arts scene can add seasoning.

**6. Cross-marketing opportunities abound.**

There appear to be incredible cross-marketing opportunities among the businesses, institutions and cultural facilities that drive downtown visitation. Unconventional venues that could become significant marketing portals for downtown include the Salina Regional Health Center, central library and government offices. Many businesses also share similar regional trade territories, creating potential economies of scale for shared promotions, advertising and events.

**7. A new vision for downtown is in the mirror, not the crystal ball.**

Downtown advocates are struggling to develop a unified vision for the central business district. While downtowners agonize over the details from pigeons to pocket parks, Salina residents appear to be seeking more basic and functional amenities. Current reasons for avoiding downtown are a lack of diverse retail, restaurant options and parking (the latter being more perception than reality). Residents give high marks to downtown's safety, cleanliness and streetscape.

We suggest that the secret to a viable niche strategy is simply creating a more **distinctive, functional and conventional downtown experience**. The following key elements are part of achieving a more competitive downtown Salina:

- Respect the local history and nostalgia embedded in the downtown experience.
- Cluster uses and activities in logical and manageable sub-districts within the downtown.
- Make downtown easier to find, park and use.
- Fortify downtown's position as a key employment center.
- Create economic development initiatives to retain, grow, incubate and attract unique one-of-a-kind businesses.
- Promote downtown through sensible tactics that take advantage of unconventional cross-marketing opportunities.
- Use downtown's arts and cultural resources to add "sizzle" and enliven the overall experience.

The following sections of the Salina Market-Based Downtown Plan will build upon the preceding principles and provide the following tools for advancing downtown development:

- **Part II Niche and Development Strategies**, providing an overall niche strategy for downtown with guidelines for future development and opportunity sites in several downtown "sub-districts".
- **Part III Implementation Recommendations**, offering suggestions for economic development, environmental improvements, marketing tactics, policies and incentives, organization and financing, including recommended sequencing, estimated costs and resources.
- **Part IV BID Organizational Assessment**, providing suggestions for refreshing the effectiveness and relevancy of downtown's business improvement district.



**SUMMARY TABLE: EXISTING RETAIL ACTIVITY WITHIN THE SALINA PRIMARY MARKET**

source: P.U.M.A survey, November 2001

EXISTING RETAIL ( <i>estimated square feet</i> )	1. Downtown Salina	2. North Broadway Boulevard Corridor	TOTAL PRIMARY MARKET
<b>Apparel &amp; Accessories</b>	37,000		<b>37,000</b>
<b>Automotive Dealers</b>	8,700	1,000	<b>9,700</b>
<b>Automotive Repair &amp; Supply</b>	43,500	26,454	<b>69,954</b>
<b>Drug &amp; Proprietary Stores</b>	3,000		<b>3,000</b>
<b>Eating &amp; Drinking Places</b>	66,500	48,502	<b>115,002</b>
<b>Food Stores</b>	27,700	25,520	<b>53,220</b>
<b>Furniture &amp; Home Furnishings</b>	108,500	7,158	<b>115,658</b>
<b>Home Appliance, Radio &amp; T.V.</b>	8,000	16,954	<b>24,954</b>
<b>Gasoline Service Stations</b>	1,500	5,300	<b>6,800</b>
<b>General Merchandise</b>	64,500	31,218	<b>95,718</b>
<b>Department Stores</b>	8,000	84,000	<b>92,000</b>
<b>Hardware, Lumber &amp; Garden Stores</b>		125,820	<b>125,820</b>
<b>**Personal Services</b>	117,200	15,426	<b>132,626</b>
<b>**Miscellaneous</b>	54,500	2,100	<b>56,600</b>
<b>TOTAL GLA:</b>	<b>548,600</b>	<b>389,452</b>	<b>938,052</b>
<i>categories marked with ** are not included in retail spending data</i>			
<b>Vacant</b>	<b>51,000</b>	<b>15,266</b>	<b>66,266</b>
<b>Vacancy Rate</b>	<b>9.3%</b>	<b>3.9%</b>	<b>7.0%</b>

**notes**

general merchandise category includes liquor stores, photography, gifts,pawn shops, sporting goods, antiques

home furnishings category includes art galleries, music stores

personal services category includes beauty/barber, tattoo, private instruction studios, gyms, travel services,banks

miscellaneous category includes bingo halls, theaters, art centers, museums

SUMMARY TABLE: EXISTING RETAIL ACTIVITY WITHIN THE SALINA SECONDARY MARKET

source: P.U.M.A survey, November 2001

EXISTING RETAIL (estimated square feet)	3. I-70/North 9 <sup>th</sup> Street Corridor	4. Crawford Street Corridor	5. South Santa Fe Corridor, Kraft Manor, Fountain Plaza Area	6. Galaxy Center/Central Mall/ Mid-State Plaza Area	7. South Ohio Corridor	TOTAL SECONDARY MARKET
Apparel & Accessories		500	9,900	57,704	10,000	78,104
Automotive Dealers	14,400	5,509				19,909
Automotive Repair & Supply	256,040	21,400	26,600	24,166		328,206
Drug & Proprietary Stores		20,180		3,714	4,500	28,394
Eating & Drinking Places	40,665	36,644	22,100	50,555	13,400	163,364
Food Stores	10,440	47,800	5,400	68,750	41,925	174,315
Furniture & Home Furnishings		9,600	40,700			50,300
Home Appliance, Radio & T.V.		7,653	18,000	13,244	3,000	41,897
Gasoline Service Stations	76,473		5,500			81,973
General Merchandise		6,700	44,030	107,095	4,550	162,375
Department Stores*				216,610		331,167
Hardware, Lumber & Garden Stores	7,938	3,800	2,250	93,164	1,800	108,952
**Personal Services	10,800	4,770	18,050	30,754	600	64,974
**Miscellaneous	35,000			34,621		69,621
TOTAL GLA:	451,756	164,556	192,530	700,377	79,775	1,703,551
categories marked with ** are not included in retail spending data						
Vacant	70,506	20,508	70,200	120,075	12,365	293,654
Vacancy Rate	15.6%	12.4%	*36.4%	17.1%	15.5%	17.2%

\*vacant former Office Depot -40,100 sf

\*includes Walmart

notes

general merchandise category includes liquor stores, photography, gifts,pawn shops, sporting goods, antiques

home furnishings category includes art galleries, music stores

personal services category includes beauty/barber, tattoo, private instruction studios, gyms, travel services,banks

miscellaneous category includes bingo halls, theaters, art centers, museums

**SUMMARY TABLE: EXISTING RETAIL ACTIVITY WITHIN THE SALINA PRIMARY MARKET - ESTIMATED ANNUAL SALES**

source: P.U.M.A survey, November, 2001, ULI Dollars & Cents of Shopping Centers: 2000

EXISTING RETAIL	1. Downtown Salina		2. North Broadway Boulevard Corridor		TOTAL EST. SQ. FT.	TOTAL EST. ANNUAL SALES
	Est. Sq. Ft.	Strip Sales/SF	Est. Sq. Ft.	Strip Sales/SF		
Apparel & Accessories	37,000	\$190			37,000	\$7,030,000
Automotive Dealers	8,700	\$121	1,000	\$121	9,700	\$1,173,700
Automotive Repair & Supply	43,500	\$121	26,454	\$121	69,954	\$8,464,434
Drug & Proprietary Stores	3,000	\$229			3,000	\$687,000
Eating & Drinking Places	66,500	\$159	48,502	\$159	115,002	\$18,285,318
Food Stores	27,700	\$241	25,520	\$241	53,220	\$12,826,020
Furniture & Home Furnishing	108,500	\$134	7,158	\$134	115,658	\$15,498,172
Home Appliance, Radio & T.V.	8,000	\$133	16,954	\$133	24,954	\$3,318,882
Gasoline Service Stations	1,500	\$1,707	5,300	\$1,707	6,800	\$11,607,600
General Merchandise	72,500	\$89	31,218	\$89	103,718	\$9,230,902
Department Stores			84,000	\$115	84,000	\$9,660,000
Hardware, Lumber & Garden Stores			125,820	\$89	125,820	\$11,197,980
**Personal Services	117,200	\$96	15,426	\$96	132,626	\$12,732,096
**Miscellaneous	54,500	*	2,100	*		*
<b>TOTAL GLA:</b>	<b>548,600</b>		<b>389,452</b>		<b>938,052</b>	<b>\$121,712,104</b>
Vacant	51,000		15,266		66,266	
Vacancy Rate	9.3%		3.9%		7.0%	

\*sales/sf not available

\*\*not included in retail spending data

SUMMARY TABLE: EXISTING RETAIL ACTIVITY WITHIN THE SALINA SECONDARY MARKET - ESTIMATED ANNUAL SALES

source: P.U.M.A survey, November, 2001, ULI Dollars & Cents of Shopping Centers: 2000

EXISTING RETAIL	3. I-70/North 9th Street Corridor		4. Crawford Street Corridor		5. South Santa Fe Corridor, Kraft Manor, Fountain Plaza Area		6. Galaxy Center/ Central Mall Mid-State Plaza Area		7. South Ohio Corridor		TOTAL EST.	TOTAL EST.
	Est. Sq. Ft.	Strip Sales/SF	Est. Sq. Ft.	Nbhd. Sales/SF	Est. Sq. Ft.	Strip Sales/SF	Est. Sq. Ft.	Regional Sales/SF	Est. Sq. Ft.	Strip Sales/SF	SQ. FT.	ANNUAL SALES
Apparel & Accessories			500	\$253	9,900	\$190	57,704	\$267	10,000	\$190	78,104	\$19,314,468
Automotive Dealers	14,400	\$121	5,509	\$161							19,909	\$2,629,349
Automotive Repair & Supply	256,040	\$121	21,400	\$161	26,600	\$121	24,166	\$232			328,206	\$43,251,352
Drug & Proprietary Stores			20,180	\$305			3,714	\$247	4,500	\$229	28,394	\$8,102,758
Eating & Drinking Places	40,665	\$159	36,644	\$213	22,100	\$159	50,555	\$370	13,400	\$159	163,364	\$38,620,757
Food Stores	10,440	\$241	47,800	\$321	5,400	\$241	68,750	\$362	41,925	\$241	174,315	\$54,152,665
Furniture & Home Furnishings			9,600	\$178	40,700	\$134					50,300	\$7,162,600
Home Appliance, Radio & T.V.			7,653	\$178	18,000	\$133	13,244	\$314	3,000	\$133	41,897	\$8,313,850
Gasoline Service Stations	76,473	\$1,707			5,500	\$1,707					81,973	\$139,927,911
General Merchandise			6,700	\$118	44,030	\$89	107,095	\$162	4,550	\$89	162,375	\$22,463,610
Department Stores*							216,610	\$294			331,167	\$81,668,789
Hardware, Lumber & Garden Stores	7,938	\$89	3,800	\$119	2,250	\$89	93,164	\$209	1,800	\$89	108,952	\$20,990,408
***Personal Services	10,800	\$96	4,770	\$128	18,050	\$96	30,754	\$218	600	\$96	64,974	\$10,142,132
***Miscellaneous	35,000	**		**		**	34,621	**		**	69,621	*
TOTAL GLA:	451,756		164,556		192,530		700,377		79,775		1,703,551	\$456,740,649
Vacant	70,506		20,508		70,200		120,075		12,365		293,654	
Vacancy Rate	15.6%		12.4%		36.4%		17.1%		15.6%		17.2%	

\*includes Walmart

\*vacant former Office Depot -40,100 sf

\*\*sales/sf not available

\*\*\*not included in retail spending data

# SUMMARY TABLE: SALINA MARKET LEAKAGE ANALYSIS

*sources: P.U.M.A survey, November, 2001, ULI Dollars & Cents of Shopping Centers: 2000 and 2001 Maps To Go*

Number of Households in Total Market: 16,937\*

*\*2001 Estimate*

	Annual Average HH \$	Total Estimated Market Expenditures	Estimated Market Annual Sales	Leakage from/ Import To Market	Less 20% "Normal" Leakage	Nbhd. Center Average Sales/SF	Supportable SF in Market	Nbhd. Center Average Store Size (SF)	Supportable Stores in Market
Apparel & Accessories	\$1,461	\$24,744,957	\$26,344,468	\$1,599,511	\$1,279,609	\$253	(5,058)	2,000	(3)
Automotive Dealers	\$5,010	\$84,854,370	\$3,803,049	(\$81,051,321)	(\$64,841,057)	\$161	402,739	3,000	134
Automotive Repair & Supply Stores	\$396	\$6,707,052	\$51,715,786	\$45,008,734	\$36,006,987	\$161	(223,646)	4,500	(50)
Drug & Proprietary Stores	\$685	\$11,601,845	\$8,789,758	(\$2,812,087)	(\$2,249,670)	\$305	7,376	9,100	1
Eating and Drinking Places	\$3,099	\$52,487,763	\$56,906,075	\$4,418,312	(\$883,345)	\$213	4,147	1,800	2
Food Stores	\$4,811	\$81,483,907	\$66,978,685	(\$14,505,222)	(\$11,604,178)	\$321	36,150	25,000	1
Furniture & Home Furnishings Stores	\$380	\$6,436,060	\$22,660,772	\$16,224,712	\$12,979,770	\$178	(72,920)	3,100	(24)
Home Appliance, Radio & TV Stores	\$1,231	\$20,849,447	11,632,732	(\$9,216,715)	(\$7,373,372)	\$178	41,423	2,000	21
Gasoline Service Stations	\$4,270	\$72,320,990	\$140,750,711	\$68,429,721	\$54,743,777	\$2,276	(24,053)	2,000	(12)
General Merchandise	\$6,001	\$101,638,937	\$31,694,512	(\$69,944,425)	(\$55,955,540)	\$118	(474,199)	2,400	(198)
Department Stores	\$5,365	\$90,867,005	\$91,328,789	\$461,784	\$369,427	\$115	(3,212)	17,300	(0)
Hardware, Lumber & Garden Stores	\$2,469	\$41,817,453	\$32,188,388	(\$9,629,065)	(\$7,703,252)	\$119	64,733	4,800	13
<b>Total Commercial</b>			<b>\$544,793,725</b>				<b>(246,519)</b>		

SUMMARY TABLE: SALINA MARKET LEAKAGE ANALYSIS

sources: P.U.M.A survey, November, 2001, ULI Dollars & Cents of Shopping Centers: 2000 and 2001 Maps To Go

Number of Households in Total Market: 16,937\*

\*2001 Estimate

	Annual Average HH Expenditure	Trade Pull Factor	Total Estimated Market Expenditures	Estimated Market Annual Sales	Leakage from/ Import To Market	Less 20% "Normal" Leakage	Nbhd. Center Average Sales/SF	Supportable SF in Market	Nbhd. Center Average Store Size (SF)	Supportable Stores in Market
Apparel & Accessories	\$1,461	\$2,396	\$40,581,729	\$26,344,468	(\$14,237,261)	(\$11,389,809)	\$253	45,019	2,000	23
Automotive Dealers	\$5,010	\$8,216	\$139,161,167	\$3,803,049	(\$135,358,118)	(\$108,286,494)	\$161	672,587	3,000	224
Automotive Repair & Supply Stores	\$396	\$649	\$10,999,565	\$51,715,786	\$40,716,221	\$32,572,977	\$161	(202,317)	4,500	(45)
Drug & Proprietary Stores	\$685	\$1,123	\$19,027,026	\$8,789,758	(\$10,237,268)	(\$8,189,814)	\$305	26,852	9,100	3
Eating and Drinking Places	\$3,099	\$5,082	\$86,079,931	\$56,906,075	(\$29,173,856)	(\$23,339,085)	\$213	109,573	1,800	61
Food Stores	\$4,811	\$7,890	\$133,633,607	\$66,978,685	(\$66,654,922)	(\$53,323,938)	\$321	166,118	25,000	7
Furniture & Home Furnishings Stores	\$380	\$623	\$10,555,138	\$22,660,772	\$12,105,634	\$9,684,507	\$178	(54,407)	3,100	(18)
Home Appliance, Radio & TV Stores	\$1,231	\$2,019	\$34,193,093	11,632,732	(\$22,560,361)	(\$18,048,289)	\$178	101,395	2,000	51
Gasoline Service Stations	\$4,270	\$7,003	\$118,606,424	\$140,750,711	\$22,144,287	\$17,715,430	\$2,276	(7,784)	2,000	(4)
General Merchandise	\$6,001	\$9,842	\$166,687,857	\$31,694,512	(\$134,993,345)	(\$107,994,676)	\$118	(915,209)	2,400	(381)
Department Stores	\$5,365	\$8,799	\$149,021,888	\$91,328,789	(\$57,693,099)	(\$46,154,479)	\$115	401,343	17,300	23
Hardware, Lumber & Garden Stores	\$2,469	\$4,049	\$68,580,623	\$32,188,388	(\$36,392,235)	(\$29,113,788)	\$119	244,654	4,800	51
Total Commercial				\$544,793,725				587,824		

Annual average household multiplied by 1.64 and  
expenditures by category number of households  
in market

al expenditures in market estimated sales within  
(demand)

market area

Estimated sales minus  
ind = calculation of unmet  
demand or market gap

minus 20% "fudge factor"

fed by industry standard - market can or cannot  
support

ed by industry standard - portable stores in market

## Salina Community Attitudes Survey Tabulations

### Question 1

	How often do you visit Downtown Salina?
once a week or more	54%
about once a month	30%
about four times per year	12%
about once per year	3%
never	1%
Total	100%

### Question 2

If you DO visit Downtown Salina, is it for:	Shopping (i.e. apparel, gifts, books, etc.)	61%
	Eating/drinking establishments	50%
	Antiques and collectibles	17%
	Art galleries, museums, theaters	14%
	Library	38%
	Other	12%
	personal or business services	54%
	special events	16%
	church services	14%
	City/county business	31%
	Salina Regional Health Center	39%

### Question 3

If you DON'T visit Downtown Salina, is it because of:	lack of restaurant options	30%
	lack of diverse retail	50%
	lack of arts, cultural scene	2%
	limited parking	31%
	other	19%
	concerns about safety	4%
	poor lighting/landscaping	1%
	lack of maintenance (trash, graffiti, dirty sidewalks/street)	4%
	hours of operation	28%



**Question 4**

<b>Which of the following area business districts do you visit at least once a month?</b>	<b>Southgate Shopping Area</b>	<b>60%</b>
	<b>Sunset Plaza Shopping Area</b>	<b>41%</b>
	<b>South Santa Fe Shopping Area</b>	<b>10%</b>
	<b>Kraft Manor Area</b>	<b>20%</b>
	<b>other</b>	<b>10%</b>
	<b>Fountain Plaza Shopping Area</b>	<b>8%</b>
	<b>Galaxy Center</b>	<b>40%</b>
	<b>Mid State Plaza</b>	<b>43%</b>
	<b>Central Mall</b>	<b>83%</b>

**Question 5**

<b>Which improvements would encourage you to visit Downtown Salina more often?</b>	<b>more diversity in restaurants</b>	<b>42%</b>
	<b>more diversity in shopping/retail services</b>	<b>45%</b>
	<b>more arts and cultural outlets</b>	<b>7%</b>
	<b>family-oriented entertainment</b>	<b>13%</b>
	<b>special events</b>	<b>8%</b>
	<b>overall consistency in business hours/days of operation</b>	<b>18%</b>
	<b>better information on what exists</b>	<b>27%</b>
	<b>nothing! leave it alone</b>	<b>14%</b>
	<b>other</b>	<b>16%</b>

**Question 6**

	<b>how long have you lived in Salina?</b>	
<b>less than 1 year</b>		<b>4%</b>
<b>1 to 5 years</b>		<b>11%</b>
<b>more than 5 years</b>		<b>85%</b>
<b>Total</b>		<b>100%</b>

**Question 7**

	<b>gender</b>	
<b>female</b>		<b>68%</b>
<b>male</b>		<b>32%</b>
<b>Total</b>		<b>100%</b>

**Question 8**

	<b>age</b>	
<b>younger than 18</b>		<b>0%</b>
<b>18-34</b>		<b>15%</b>
<b>35-49</b>		<b>29%</b>
<b>50-69</b>		<b>37%</b>

<b>69+</b>	19%
<b>Total</b>	100%

**Question 9**

	<b>location in Salina</b>
<b>north of Crawford/east of Santa Fe</b>	23%
<b>north of Crawford/west of Santa Fe</b>	12%
<b>south of Crawford/east of Santa Fe</b>	47%
<b>south of Crawford/ west of Santa Fe</b>	18%
<b>Total</b>	100%

**Question 10**

	<b>annual household income</b>
<b>\$75,000 or more</b>	23%
<b>\$25,000 to \$34,999</b>	19%
<b>\$50,000 to \$74,999</b>	28%
<b>less than \$25,000</b>	14%
<b>\$35,000 to \$49,999</b>	16%
<b>Total</b>	100%

### Frequency of Visits to Downtown Salina by Age

		18-34	35-49	50-69	69+
How often do you visit Downtown Salina?	once a week or more	56%	50%	50%	44%
	about once a month	25%	36%	29%	37%
	about four times per year	15%	12%	14%	14%
	about once per year	3%	3%	5%	4%
	never	1%	0%	1%	0%

### Reasons for Visiting Downtown Salina by Age

		18-34	35-49	50-69	69+
Reasons for Visiting Downtown Salina	Shopping (i.e. apparel, gifts, books, etc.)	59%	64%	58%	59%
	Eating/drinking establishments	45%	57%	31%	47%
	Antiques and collectibles	14%	17%	11%	15%
	Art galleries, museums, theaters	12%	13%	6%	10%
	Library	36%	38%	35%	39%
	Other	9%	10%	11%	7%
	personal or business services	54%	47%	64%	52%
	special events	17%	16%	17%	15%
	church services	14%	11%	16%	12%
	City/county business	28%	36%	28%	28%
	Salina Regional Health Center	37%	43%	42%	42%

### Reasons for not Visiting Downtown Salina by Age

		18-34	35-49	50-69	69+
Reasons for not Visiting Downtown Salina	lack of restaurant options	34%	27%	34%	29%
	lack of diverse retail	58%	52%	24%	49%
	lack of arts, cultural scene	1%		4%	
	limited parking	31%	38%	32%	39%
	other	13%	20%	30%	18%
	concerns about safety	5%	4%	10%	
	poor lighting/landscaping	2%	1%		
	lack of maintenance (trash, graffiti, dirty sidewalks/street	2%	4%	2%	4%
	hours of operation	24%	33%	18%	45%

**Business Districts Visited at Least Once a Month by Age**

		18-34	35-49	50-69	69+
<b>Business Districts Visited at Least Once a Month</b>	<b>Southgate Shopping Area</b>	48%	69%	35%	58%
	<b>Sunset Plaza Shopping Area</b>	55%	33%	57%	46%
	<b>South Santa Fe Shopping Area</b>	11%	9%	13%	11%
	<b>Kraft Manor Area</b>	23%	16%	10%	24%
	<b>other</b>	12%	9%	8%	11%
	<b>Fountain Plaza Shopping Area</b>	8%	7%	7%	9%
	<b>Galaxy Center</b>	43%	43%	29%	45%
	<b>Mid State Plaza</b>	44%	48%	40%	42%
	<b>Central Mall</b>	75%	89%	67%	86%

**Improvements that Would Encourage Visits to Downtown Salina by Age**

		18-34	35-49	50-69	69+
<b>Improvements that would Encourage Visits to Downtown Salina</b>	<b>more diversity in restaurants</b>	36%	44%	31%	32%
	<b>more diversity in shopping/retail services</b>	49%	46%	35%	37%
	<b>more arts and cultural outlets</b>	7%	6%	3%	5%
	<b>family-oriented entertainment</b>	16%	14%	17%	15%
	<b>special events</b>	8%	5%	10%	9%
	<b>overall consistency in business hours/days of operation</b>	14%	22%	7%	28%
	<b>better information on what exists</b>	34%	26%	29%	38%
	<b>nothing! leave it alone</b>	16%	11%	27%	16%
	<b>other</b>	10%	16%	18%	14%

**Frequency of Visits to Downtown Salina by Gender**

		gender	
		female	male
<b>How often do you visit Downtown Salina?</b>	<b>once a week or more</b>	51%	60%
	<b>about once a month</b>	32%	26%
	<b>about four times per year</b>	13%	10%
	<b>about once per year</b>	3%	2%
	<b>never</b>	1%	0%

**Reasons for Visiting Downtown Salina by Gender**

		gender	
		female	male
<b>Reasons for Visiting Downtown Salina</b>	<b>Shopping (i.e. apparel, gifts, books, etc.)</b>	67%	48%
	<b>Eating/drinking establishments</b>	51%	50%
	<b>Antiques and collectibles</b>	19%	13%
	<b>Art galleries, museums, theaters</b>	15%	14%
	<b>Library</b>	44%	27%
	<b>Other</b>	13%	12%
	<b>personal or business services</b>	52%	57%
	<b>special events</b>	18%	10%
	<b>church services</b>	14%	14%
	<b>City/county business</b>	31%	32%
	<b>Salina Regional Health Center</b>	41%	34%

**Reasons for not Visiting Downtown Salina by Gender**

		gender	
		female	male
<b>Reasons for not Visiting Downtown Salina</b>	lack of restaurant options	27%	36%
	lack of diverse retail	48%	54%
	lack of arts, cultural scene	1%	3%
	limited parking	30%	33%
	other	21%	12%
	concerns about safety	4%	4%
	poor lighting/landscaping	1%	1%
	lack of maintenance (trash, graffiti, dirty sidewalks/street	4%	3%
	hours of operation	28%	31%

**Business Districts Visited at Least Once a Month by Gender**

		gender	
		female	male
<b>Business Districts Visited at Least Once a Month</b>	Southgate Shopping Area	59%	60%
	Sunset Plaza Shopping Area	40%	44%
	South Santa Fe Shopping Area	10%	10%
	Kraft Manor Area	17%	27%
	other	10%	9%
	Fountain Plaza Shopping Area	8%	8%
	Galaxy Center	42%	38%
	Mid State Plaza	40%	48%
	Central Mall	83%	81%

### Improvements that Would Encourage Visits to Downtown Salina by Gender

		gender	
		female	male
Improvements that would Encourage Visits to Downtown Salina	more diversity in restaurants	39%	46%
	more diversity in shopping/retail services	48%	38%
	more arts and cultural outlets	7%	8%
	family-oriented entertainment	14%	13%
	special events	8%	7%
	overall consistency in business hours/days of operation	18%	16%
	better information on what exists	28%	26%
	nothing! leave it alone	13%	17%
	other	16%	15%

### Frequency of Visits to Downtown Salina by Income

		Income	
		less than \$50,000	\$50,000 or more
How often do you visit Downtown Salina?*	once a week or more	51%	57%
	about once a month	30%	32%
	about four times per year	14%	10%
	about once per year	4%	2%
	never	1%	0%

\* Differences between subgroups are statistically significant.

### Reasons for Visiting Downtown Salina by Household Income

		Income	
		less than \$50,000	\$50,000 or more
Reasons for Visiting Downtown Salina	Shopping (i.e. apparel, gifts, books, etc.)	59%	61%
	Eating/drinking establishments	42%	60%
	Antiques and collectibles	14%	18%
	Art galleries, museums, theaters	10%	18%
	Library	37%	40%
	Other	9%	14%
	personal or business services	56%	50%
	special events	17%	18%
	church services	14%	13%
	City/county business	28%	35%
	Salina Regional Health Center	40%	37%

### Reasons for not Visiting Downtown Salina by Household Income

		Income	
		less than \$50,000	\$50,000 or more
Reasons for not Visiting Downtown Salina	lack of restaurant options	33%	30%
	lack of diverse retail	47%	55%
	lack of arts, cultural scene	2%	2%
	limited parking	34%	36%
	other	19%	15%
	concerns about safety	5%	3%
	poor lighting/landscaping	1%	1%
	lack of maintenance (trash, graffiti, dirty sidewalks/street	3%	3%
	hours of operation	28%	31%



**Business District Visited at Least Once a Month by Household Income**

		Income	
		less than \$50,000	\$50,000 or more
<b>Business Districts Visited at Least Once a Month</b>	Southgate Shopping Area	48%	71%
	Sunset Plaza Shopping Area	53%	31%
	South Santa Fe Shopping Area	11%	9%
	Kraft Manor Area	20%	19%
	other	11%	9%
	Fountain Plaza Shopping Area	8%	8%
	Galaxy Center	40%	45%
	Mid State Plaza	43%	45%
	Central Mall	76%	89%

**Improvements that Would Encourage Visits to Downtown Salina by Household Income**

		Income	
		less than \$50,000	\$50,000 or more
<b>Improvements that would Encourage Visits to Downtown Salina</b>	more diversity in restaurants	33%	50%
	more diversity in shopping/retail services	41%	49%
	more arts and cultural outlets	5%	8%
	family-oriented entertainment	16%	12%
	special events	9%	8%
	overall consistency in business hours/days of operation	17%	21%
	better information on what exists	34%	22%
	nothing! leave it alone	19%	9%
	other	13%	16%

**City of Salina Market-Based Downtown Plan  
Steering Committee Roster**

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Rev. 1-8-02



# **City of Salina Market-Based Downtown Plan**

## **Part II: Niche and Development Strategies**

**Final Draft**  
April, 2002

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### **Part II Appendices:**

- A. Downtown Development District Map
- B. Niche and Development Strategies Matrix

## I. Downtown Salina Niche Strategy

Part I of the Salina Market-Based Downtown Plan included an economic profile, competition and leakage analysis, evaluation of comparable business districts, 1,300 responses to a community attitudes survey and perspectives from more than 125 downtown stakeholders. The key conclusions from the Part I Competitive Analysis, which are explained on pages 25 and 26 of the Part I report, include:

1. Salina is a stable, predictable and conservative market.
2. Salina's retail market is balanced.
3. Downtown remains a significant regional attraction.
4. Downtown is relevant to the locals.
5. Arts and culture provide the sizzle, NOT the steak.
6. Cross-marketing opportunities abound.
7. A new vision for downtown is in the mirror, not the crystal ball.

Part I concluded that the secret to a viable niche strategy is simply creating a more distinctive, functional and conventional downtown experience. The resulting recommended niche strategy for downtown Salina can be summarized as:

***Experience Downtown Salina:  
Unique Shopping, Dining, Arts and Entertainment***



There are several key phrases within this strategy that differentiate downtown:

- **Experience:** Downtown is a collection of activities that together create a multi-dimensional “experience” – a place to walk, see and participate in a variety of activities.
- **Downtown Salina:** Downtown remains relevant to Salina residents with 84% visiting the downtown once a month or more. Our research finds that downtown is generally perceived as a positive place and residents appear predisposed to shop, dine and be entertained there.
- **Unique:** Downtown will offer unique one-of-a-kind attractions, ranging from its myriad of arts and cultural venues to retail and restaurants that are locally-owned, independent and distinctive to Salina.
- **Shopping, Dining, Arts & Entertainment:** The steak *and* the sizzle are offered in downtown. Our research finds that a stronger shopping and dining product will most directly appeal to Salina’s local market. Arts and entertainment provide a backdrop of creativity and innovation and reinforce the area’s uniqueness.

The remaining recommendations within this plan are oriented to building upon this niche strategy.

## II. Downtown Development Districts

Downtown includes a large geographic area, broadly defined for the purposes of this plan from North Street to the north, Ninth Street to the west, Prescott Avenue to the south and the Smoky Hill River to the east. This area encompasses more than 80 square blocks and a variety of use areas ranging from residential neighborhoods to heavy industrial.

Downtown development districts are recommended to help guide the methodical and sequential clustering of downtown uses. In order to be successful, many complementary uses require a “critical mass” of activity to convey a sense of place and provide a suitable destination to attract patrons.

For downtown Salina, we are recommending five logical development districts, including: (1) Santa Fe Avenue District, (2) Employment District, (3) Civic District, (4) Hospital District, and (5) Mill District. Development strategies for each district are provided in following pages and a map illustrating the physical layout of the districts is provided in the Appendix.

**Overall Downtown Development Framework:** The proposed downtown development districts are intended to contribute to and create an overall physical framework that is founded on the following principles:

- **Build on history and inherent strengths:** Downtown’s history, distinctive scale and architecture enhance its overall ability to deliver a unique experience. We aim to build upon its authenticity as opposed to creating a themed or sterilized facsimile.
- **Capitalize on anchors and connect attractions:** Downtown’s anchor attractions include the city/county offices to the north and the Salina Regional Health Center to the south. These two destinations act as downtown’s “Nordstroms”, attracting hundreds of thousands of visitors to the central business district each year. The development strategy aims to capitalize on the activity generated by these anchors and to connect them to attractions in between.
- **Keep downtown functional and easy to use:** The development strategy recognizes the physical and psychological constraints of downtown development – downtown must be a manageable scale and easy to use. Development districts will aim to take advantage of existing infrastructure -- particularly parking and many of the pedestrian amenities that were created in the 1980s.
- **Respect the scale and expectations of the marketplace:** Development districts are tailored to meet reasonable expectations of the Salina marketplace. Downtown can become more vital, but change will occur in an incremental and methodical pattern – not an overnight transformation.

## 1. SANTA FE AVENUE DISTRICT

**Location:** Three blocks of Santa Fe Avenue, from Ash Street to the north and Mulberry Street to the south.

**Role and Relation to the Niche Strategy:** Santa Fe is the heart of downtown and the core of the “downtown experience”. Our goal is to create a three-block stretch of shopping, dining, arts and entertainment. If the heart is strong, the rest of downtown will function well.

**Sense of Place:** Santa Fe provides historic architecture and a sense of scale that is ideal for Salina’s pedestrian experience. Policies in this area should concentrate incentives for the restoration of facades, illumination of traditional signs and attraction of businesses that make downtown a unique not-to-be-missed attraction. We want “transparency” along the street – storefronts with inviting windows and visible displays, opportunities for sidewalk cafes and active use of mid-block pocket parks. Upper floors of buildings are ideal for office and residential loft uses. Santa Fe should be the primary venue hosting periodic special events and festivals. The pedestrian canopies from the late 1980s streetscape effort provide visible gateways for the district. The northern face of the north gateway and southern face of the south gateway should be illuminated to announce the downtown experience.



*Pedestrian canopies could serve as illuminated “gateways” to the district.*

**Suggested Uses and Activities:** Santa Fe is our initial focus for downtown shopping, dining, arts and

entertainment:

- A suggested retail strategy is to create a “linear department store” along Santa Fe. Our market analysis finds a lack of mid-price point merchandise in the Salina market as the department store category is dominated by discounters and big boxes. Adjusted for Salina’s significant regional “pull factor” our leakage analysis finds a genuine gap for department store merchandise. A variety of retail concepts are suggested, including apparel and accessories (men, women, children – all types), home furnishings, kitchenware and accessories, shoes, gifts, books, toys, hobbies, etc. The only prerequisite is that retail be local, independent and unique, offering a high level of quality and customer service. *Suggested prototype: Martha & David’s*

- Restaurants are a natural for Santa Fe Avenue, particularly with traffic already generated by downtown employers, cultural attractions and the anticipated opening of the Fox Theater. A variety of restaurant concepts were supported by the community attitude survey, including Mexican, “ethnic” and family style dining. New restaurants should provide a quality dining experience in a sophisticated environment. Our surveys found that higher income households are already visiting downtown seeking this type of dining experience. *Suggested prototypes: Caper’s, Gutierrez Restaurant*
- Entertainment, including live music and dancing, with dining is also recommended; however, we support the City’s conditional use permit process for eating and drinking establishments in the Santa Fe District. Conventional bars and alcohol-oriented clubs may be better accommodated in the Mill District.

**Development Challenges and Opportunity Sites:** The most significant development challenge for the Santa Fe District is to recruit tenant prospects and guide the restoration of a variety of small buildings with a diverse, entrepreneurial and independent ownership profile. There is no central site or large ownership assemblage to advance development. Promoting development in this environment will require a repositioning of services offered by the business improvement district, Salina Downtown Inc and the City of Salina. These agencies will need to work cooperatively to create an environment to attract and incent new investment.

As Santa Fe is energized, parking will become a more significant issue and a potential development constraint. A parking management plan should be developed to address on-street parking, including rigid enforcement of 2-hour zones as the area develops. The Santa Fe District’s employee and long term parking challenges will be addressed by the expansion of parking supply in the adjacent Employment District.

#### **Linkages to Other Districts:**

- Become an interesting destination and attraction to capture patrons from the downtown “anchors” found in the Civic District to the north and the Hospital District to the south.
- Become an active retail, dining, arts and entertainment center, creating a value-added amenity to attract new businesses and office tenants in the Employment District.
- Share parking resources with the Employment District – daytime parking reservoir for employees, nighttime supply for consumers.
- Mill District can become incubator for new retail, dining and arts concepts that can later mature and move to the Santa Fe District.



## 2. EMPLOYMENT DISTRICT

**Location:** The Employment District surrounds the Santa Fe Avenue District in a “U”-shaped area bounded by Ash Street to the north, Eighth Street to the west, South Street to the south and Fourth Street to the east.

**Role and Relation to the Niche Strategy:** The Employment District provides the primary job base that is central to the long-term stability of downtown.

**Sense of Place:** The Employment District provides the opportunity to cultivate a pedestrian-oriented work environment that is unique to Salina. Businesses located in the Employment District are within walking distance of a variety of key amenities, including:

- The retail, dining, arts and entertainment experience of Santa Fe Avenue.
- Downtown anchors, including the city/county government complex and Salina Regional Health Center.
- Recreational amenities offered by the nearby Oakdale and Kenwood Parks.
- Residential living options in the historic neighborhoods located to the east, south and west.



*Businesses located within the district are within walking distance to key amenities.*

**Suggested Uses and Activities:** There are several business types that can thrive in downtown including:

- Primary office employment, including banking and other large (more than 25 employees) businesses.
- Support businesses for downtown’s anchors, including government related support to the north and health services to the south.
- Professional office and personal service businesses that currently comprise much of downtown’s employment base.
- Entrepreneurs that choose to locate their business downtown for the unique environment and lifestyle that the area affords.

**Development Challenges and Opportunity Sites:** The Employment District offers the most immediate development opportunities in downtown Salina. Key development sites for short-term (within the next three years) consideration include:

- **Roosevelt/Lincoln Schools:** As part of Salina's aggressive school construction program, the Roosevelt/Lincoln Schools will cease to exist as a school campus in the spring of 2003. The campus includes the 49,000 square foot Lincoln building to the north, 46,000 square foot gymnasium and cafeteria in the center and 42,300 square foot Roosevelt building to the south. The campus's buildings and systems have grown incrementally over the past 80 years. The two buildings are outdated and would be extremely expensive to convert to a new use.

The cafeteria/gymnasium is the most marketable component of the campus. This recreational facility could become operated by either the City of Salina or the YMCA.

Of the two remaining buildings, we find the most value in the Lincoln building to the north. In addition to historic integrity, the building has a 250-seat theater that appears to be in reasonable condition. Lincoln has value for an institutional use, particularly arts and/or education related. Roosevelt, the southernmost structure on the campus, is problematic. We suspect conversion costs are high given the age and condition of the building and the low supportable rents for housing and office uses in the Salina marketplace. We support demolition of Roosevelt, particularly if a reuse solution cannot be determined within a reasonable time frame (i.e. 24 months).



*The Lincoln School and cafeteria/gymnasium buildings.*

- **The Phoenix Hotel:** Located at the corner of Iron and Fifth Streets, the Phoenix Hotel is a key development site that could advance both the Employment and Santa Fe Avenue Districts. Currently, the Phoenix serves as a residential hotel. It has too many rooms and requires too much investment to realistically upgrade the facility to a more conventional hotel use.

The Phoenix site, however, is of strategic importance to downtown. We see the site as a potential redevelopment project including a parking structure and an adjoining office building or small modern full-service hotel. Parking on the site could serve a variety of downtown attractions, including the Salina Community and Fox Theaters. A structure would also provide a reservoir of parking to support additional primary employment during the day and retail, dining and entertainment uses at night.



*The Phoenix site is of strategic importance to downtown.*

- **300 Block of South Santa Fe Avenue:** While only one block, the 300 block of South Santa Fe Avenue creates a psychological barrier between the core of downtown and the Salina Regional Health Center. With more than 1,000 employees and nearly 100,000 annual visitations, SRHC is a major economic engine for downtown. We suggest planning and policies to encourage the hospital campus to grow to the north and other infill development that can help eliminate this gap of relative inactivity.

In addition to the preceding development opportunity sites, **parking** is the most significant challenge in the Employment District. Fortunately, many publicly-owned surface lots exist in strategic locations throughout the District. Many of these lots were acquired and landscaped as part of the late 1980s streetscape improvement project. To accommodate continued business growth in downtown, we recommend a parking supply expansion study to evaluate the potential for one or more of these lots to be converted to a parking structure within the next five years. The development of a parking structure will require an innovative financing strategy such as a parking district.

#### **Linkages to Other Districts:**

- Area of primary and secondary employment providing a stabilizing job base for downtown.
- Strategic parking and development sites that support investment in both the Employment and Santa Fe Avenue Districts.
- Support services and businesses for downtown's key government and health anchors.

### 3. CIVIC DISTRICT

**Location:** Encompassing the city and county government complex, roughly bound by Elm Street to the north, Tenth Street to the west, Ash Street to the south and Santa Fe Avenue to the east.

**Role and Relation to the Niche Strategy:** The Civic District is one of two primary activity anchors in the downtown. In addition to providing nearly 1,000 jobs, the city and county offices, library and post office collectively generate more than 450,000 visits per year. The Civic District is part of the bedrock that provides downtown with a generally positive perception among Salina residents. Much like an anchor department store in a mall, the Civic District can be an effective marketing channel to communicate downtown's many amenities to city/county government visitors.



*The Civic district could serve as a channel to market downtown's amenities.*

**Sense of Place:** The Civic District includes several clusters of government buildings, including the City/County administrative buildings, County courts and the juvenile detention center. Pedestrian directories and signage could better link the various destinations within the District. The Civic District could also be better linked to the Santa Fe and Employment Districts to the south by improving pedestrian lights and crosswalks.



*Improved pedestrian lights and signage could better link the Civic District to the Santa Fe and Employment districts.*

**Suggested Uses and Activities:** The Civic District should continue to accommodate the growth of city and county government functions in Salina. Other aligned civic organizations, such as the Chamber of Commerce, complement the use mix.

**Development Challenges and Opportunity Sites:** Within the Civic District, sites should be identified to accommodate the continued future growth of city and county government facilities. We find that the city complex could grow in either of two directions – to the east toward and across Santa Fe Avenue, or north across Elm Street.

We also recommend that the City and County governments consider adopting policies to concentrate the future growth and development of civic facilities in downtown. A “downtown first” policy could responsibly consolidate the capital and operational costs of civic facilities in downtown, plus provide certainty to the downtown community of the governments’ long term intent – similar to a 99-year lease commitment by a mall anchor.

**Linkages to Other Districts:**

- Primary source of visitors and vital marketing channel for the northern end of the Santa Fe Avenue District.
- Anchor activity that supports development of support businesses and services in the Employment District.

#### 4. HOSPITAL DISTRICT

**Location:** Encompassing the Salina Regional Health Center and environs, roughly bounded by South Street to the north, Eighth Street to the west, Prescott Avenue to the south and Fifth Street to the east.

**Role and Relation to the Niche Strategy:** Similar to the Civic District, the Hospital District provides a critical activity anchor for the downtown. With more than 1,000 employees and generating more than 100,000 annual visitations, the Salina Regional Health Center is, after city and county government, downtown's number two attraction.

**Sense of Place:** As a hospital campus, the Salina Regional Health Center creates an internal space that effectively connects the hospital to parking and related medical offices. There is considerable tension at the District's western and southern boundaries where the campus borders historic residences. The eastern boundary is limited by the City's water plant and the Smoky River. The 300 block of South Santa Fe Avenue, which separates the Hospital and Santa Fe Avenue Districts, provides a barrier of inactivity.

**Suggested Uses and Activities:** The continued long term growth of the Salina Regional Health Center should be accommodated within the Hospital District. Downtown's overall economic condition would be endangered if the Health Center has to look at alternative sites for expansion.



*Long term growth of the Salina Regional Health Center should be accommodated within the Hospital district.*

**Development Challenges and Opportunity Sites:** The key challenge in the Hospital District is accommodating the long term growth of the Salina Regional Health Center while protecting the integrity of historic neighborhoods to the south and west:

- Three homes on the 7<sup>th</sup> Street cul de sac within the hospital campus create uncertainty for the future expansion of the hospital. These homes are not considered historic and are not part of historic district IV that includes 8<sup>th</sup> Street. The City should have a role in helping the hospital acquire and demolish these homes to provide more certainty for facility expansion planning.

- Prescott Avenue provides a more formidable challenge for hospital expansion planning. In this area, hospital expansion must be compatible with the adjacent residential historic district. We support a compromise solution that preserves a portion of the homes and/or residential development scale with uses that are compatible with the residential neighborhood.



*Prescott Avenue residence*

- City policies and development incentives should be created to direct future hospital campus expansion north along the 300 block of South Santa Fe Avenue. Encouraging expansion of the hospital campus to the north will connect the hospital's employees and visitors to the retail, dining and entertainment amenities within the Santa Fe Avenue District.



*The 300 block of Santa Fe Avenue could more effectively connect the hospital district to downtown.*

**Linkages to Other Districts:**

- Primary source of visitors and a vital marketing channel for the southern end of the Santa Fe Avenue District.
- Anchor activity that supports development of support businesses and services in the Employment District.

## 5. MILL DISTRICT

**Location:** The historic mill and warehouse area located in the northern part of the central business district, bounded roughly by North Street to the north, Ninth Street and Santa Fe Avenue to the east, Ash Street to the south and Third and Fifth Streets to the east.

**Role and Relation to the Niche Strategy:** The Mill District embodies part of the rich history of Salina, back to the days that the city was a worldwide agricultural powerhouse. This area was called “The Mill District” in the late nineteenth and early twentieth centuries. The district’s collection of mills and warehouses provide visible and enduring landmarks and icons for downtown. It is a different part of the downtown experience, more adventurous and “edgy” than the rest of the central business district.

**Sense of Place:** The Mill District provides a strong visual backdrop and historical context for downtown Salina. While mills and warehouses may be common in communities throughout Kansas, it is rare to find such a large assemblage of these structures. We suggest that this area retain much of the “grittiness” that makes it a unique area – including railroad tracks, original brick streets, rough or non-existent sidewalks – a living museum, of sorts. New signage and environmental improvements should be subtle and not overshadow the authenticity of the area.



*Grain elevators in the district provide a strong visual backdrop, historical context to downtown.*

**Suggested Uses and Activities:** We recommend that the Mill District become downtown’s area for innovation and creativity. We see a myriad of use types, including the retention of existing warehousing and manufacturing functions, plus many new creative use types including:

- Artist studios and lofts;
- Entertainment, including alcohol oriented dance and nightclubs (in conjunction with a “Good Neighbor Policy” that establishes standards of operations and behavior);
- Live/work environments.

The Mill District, with lower real estate costs, could become an “incubator” for retail and business concepts that later expand and/or move to the more mainstream Santa Fe Avenue District.



**Development Challenges and Opportunity Sites:** To preserve many of the significant mill and warehouse structures in the Mill District, we recommend that the city consider creating a local historic district that includes warehouse buildings in the vicinity of Elm Street from Santa Fe Avenue to Fifth Street, and the historically significant Lee Mill at Pine Street. Incentives should be developed to encourage property owners to stabilize and improve historic properties, including the restoration of original facades and business signs. Zoning in the area should be amended to allow a multitude of uses, ranging from existing manufacturing to residential to entertainment.



*A local historic district could be created to preserve future value for reinvestment.*

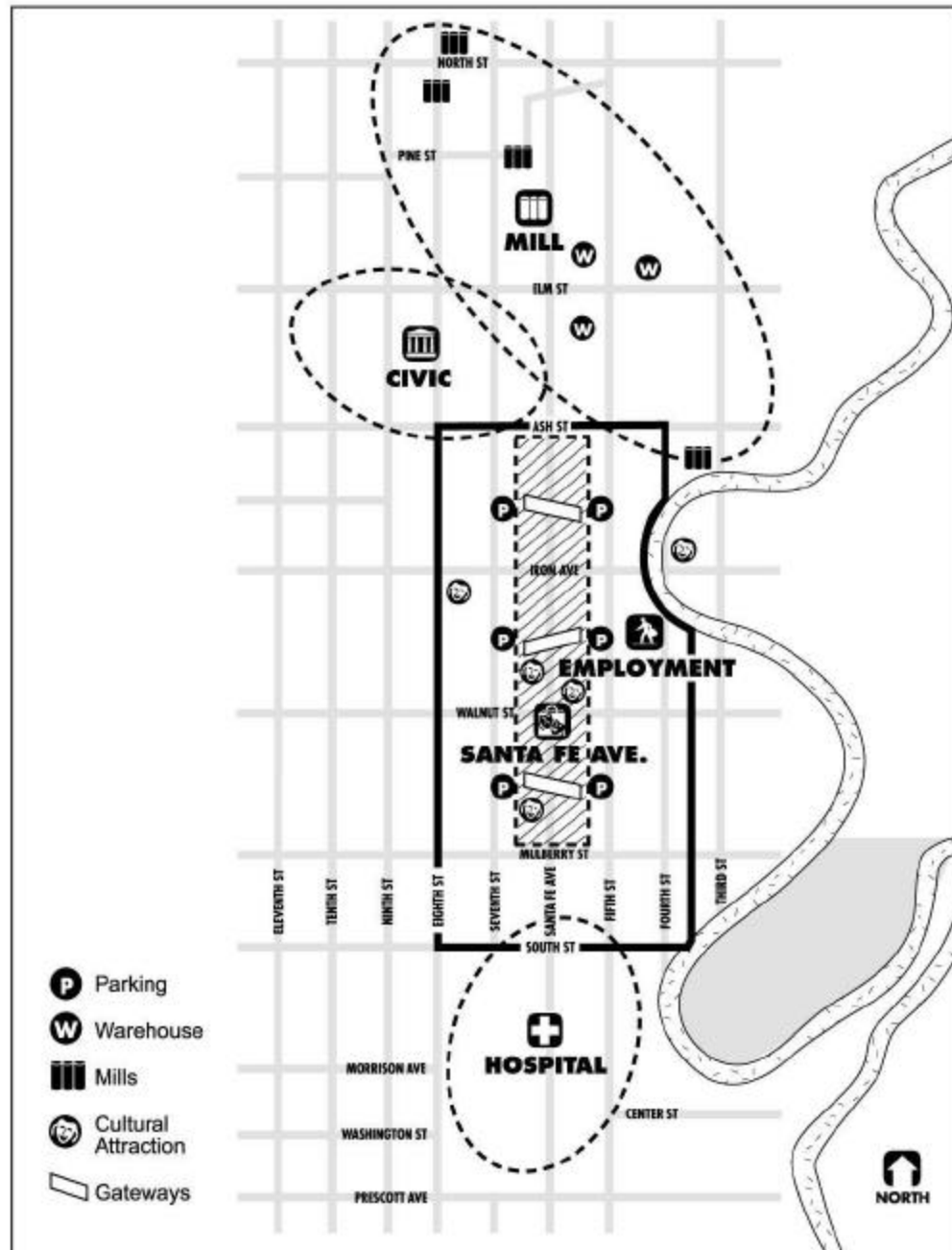
**Linkages to Other Districts:**

- Mill District becomes an incubator for retail and business concepts that could later expand and/or relocate to the Santa Fe Avenue District.
- Mill District becomes a visual icon and backdrop for downtown.

# City of Salina Market-Based Downtown Plan

April 2002 Final Draft

Prepared by Progressive Urban Management Associates



**Downtown Salina Niche and Development Strategies**

*Prepared by Progressive Urban Management Associates 4/02*

Development District	Location	Role/Relation to Niche Strategy	Sense of Place	Suggested Uses/Activities	Development Challenges/ Opportunity Sites	Linkages to Other Districts
Santa Fe Avenue	three blocks of Santa Fe Avenue between Ash Street to the north and Mulberry Street to the south	<ul style="list-style-type: none"><li>downtown's heart</li><li>core of the "downtown experience"</li><li>envision a three-block stretch of shopping, dining, arts &amp; entertainment</li></ul>	<ul style="list-style-type: none"><li>historic architecture, sense of scale</li><li>provide incentives for facade restoration, illumination of traditional signs, attraction of businesses</li><li>activate street -level, venue for festivals, "transparency"</li><li>upper levels – office and residential use</li><li>illumination of north &amp; south faces of pedestrian canopies as gateways</li></ul>	<ul style="list-style-type: none"><li>a focus for shopping, dining, arts and entertainment</li><li>"linear department store" featuring local, high-quality, independent retail</li><li>restaurant concepts to include Mexican, ethnic and family style dining in a sophisticated environment</li><li>live music with dancing and dining-support of conditional use permitting</li></ul>	<ul style="list-style-type: none"><li>tenant prospect recruitment</li><li>guide the restoration of a variety of small buildings with diverse, independent ownerships</li><li>alignment, repositioning of services offered by BID, SDI and City to attract investment</li><li>develop parking management plan</li></ul>	<ul style="list-style-type: none"><li>attract patrons from Civic and Hospital District "anchors"</li><li>become an amenity to attract new businesses and office tenants to Employment District</li><li>share parking resources with Employment District</li><li>future site for mature retail, dining and arts concepts incubated in Mill District</li></ul>
Employment	surrounds Santa Fe Avenue District in a "U"-shaped area bounded by Ash Street to the north, Eighth Street to the west, South Street to the south and Fourth Street to the east	<ul style="list-style-type: none"><li>provides primary job base essential to downtown's long-term stability</li></ul>	<ul style="list-style-type: none"><li>pedestrian-oriented work environment</li><li>walking distance to Santa Fe Avenue District, civic and hospital anchors, parks and adjacent residential neighborhoods</li></ul>	<ul style="list-style-type: none"><li>primary office employment</li><li>support businesses for civic and hospital anchors</li><li>professional office/personal service businesses</li><li>location of entrepreneurs seeking unique environment, downtown lifestyle</li></ul>	<ul style="list-style-type: none"><li>Roosevelt/Lincoln Schools</li><li>Phoenix Hotel</li><li>300 block of Santa Fe Avenue</li><li>develop parking supply expansion plan</li></ul>	<ul style="list-style-type: none"><li>primary and secondary employment provides downtown job base</li><li>parking and development sites support investment in Employment and Santa Fe Avenue districts</li><li>support businesses and services for civic and hospital anchors</li></ul>
Civic	encompasses the city and county government complex, roughly bound by Elm Street to the north, Tenth Street to the west, Ash Street to the south and Santa Fe Avenue to the east.	<ul style="list-style-type: none"><li>primary activity anchor that provides jobs, generates nearly one-half million visits per year</li><li>downtown's number one attraction</li><li>channel to market downtown's amenities to city/county government visitors</li></ul>	<ul style="list-style-type: none"><li>improved linkage of government buildings through pedestrian directories and signage</li><li>enhance linkage to Santa Fe Avenue and Employment Districts via improved pedestrian lights and crosswalks</li></ul>	<ul style="list-style-type: none"><li>continue to accommodate growth of Salina's government facilities</li><li>Chamber of Commerce complements the use mix</li></ul>	<ul style="list-style-type: none"><li>identify sites to the east and north, within the Civic District to accommodate future growth of city and county government facilities</li><li>adopt "downtown first" growth policy</li></ul>	<ul style="list-style-type: none"><li>primary visitor source and marketing channel for north end of Santa Fe Avenue District</li><li>sustains development of Employment District support businesses and services</li></ul>
Hospital	encompasses the Salina Regional Health Center and environs, roughly bounded by South Street to the north, Eighth Street to the west, Prescott Avenue to the south and Fifth Street to the east	<ul style="list-style-type: none"><li>primary activity anchor that provides jobs, generates more than 100,000 visits per year</li><li>downtown's number two attraction</li></ul>	<ul style="list-style-type: none"><li>hospital campus connects health facilities, parking in district interior</li><li>some tension between Hospital District and historic residences on western and southern boundaries</li></ul>	<ul style="list-style-type: none"><li>continue to accommodate long-term growth of the SRHC within the Hospital District to ensure downtown's economic vitality</li></ul>	<ul style="list-style-type: none"><li>city assistance in acquisition and demolition of 7<sup>th</sup> Street cul-de-sac homes to accommodate future hospital expansion</li><li>hospital expansion along Prescott Avenue needs to be compatible with/sensitive to adjacent historic residential district</li><li>city encouragement of hospital campus expansion north to 300 block of Santa Fe Avenue, thus providing a connection to the Santa Fe Avenue District</li></ul>	<ul style="list-style-type: none"><li>primary visitor source and marketing channel for south end of Santa Fe Avenue District</li><li>sustains development of Employment District support businesses and services</li></ul>
Mill	the historic mill and warehouse area located in the northern part of the central business district, roughly bounded by North Street to the north, Ninth Street and Santa Fe Avenue to the east, Ash Street to the south and Third and Fifth Streets to the east	<ul style="list-style-type: none"><li>embodiment of Salina's history as agricultural powerhouse</li><li>area was referred to as "The Mill District" during the late 19<sup>th</sup>/early 20<sup>th</sup> centuries</li><li>a more adventurous, "edgy" part of downtown</li></ul>	<ul style="list-style-type: none"><li>provides a strong visual backdrop, historical context for downtown</li><li>retain feel of "grittiness" including railroad tracks, original brick streets, etc.</li><li>subtle use of new signage and environmental improvements</li></ul>	<ul style="list-style-type: none"><li>retain existing warehousing and manufacturing functions</li><li>artist studios and lofts</li><li>entertainment, including alcohol-oriented dance and nightclubs – apply "Good Neighbor Policy"</li><li>live/work environments</li><li>a retail and business "incubator"</li></ul>	<ul style="list-style-type: none"><li>city creation of a local historic district</li><li>develop incentives to encourage property improvements, restoration</li><li>amend zoning to allow a wide variety of uses</li></ul>	<ul style="list-style-type: none"><li>an incubator for retail and other business concepts that could expand/relocate to the Santa Fe Avenue district</li><li>a visual icon and backdrop for downtown</li></ul>



# City of Salina Market-Based Downtown Plan

## Part III: Recommendations for Moving Forward

Final Draft  
April, 2002

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### Part III Appendix:

- A. Zip code mapping

## I. Overall Implementation Gameplan

The preceding sections of the Market-Based Downtown Plan provide a comprehensive competitive analysis (Part I) and niche and development strategies (Part II). The competitive analysis concluded that a viable niche strategy is to create a more distinctive, functional and conventional downtown experience. The resulting recommended niche strategy, “*Experience Downtown Salina: Unique Shopping, Dining, Arts and Entertainment*”, aims to differentiate downtown as:

- A collection of activities that together create a multi-dimensional experience;
- A destination that offers unique one-of-a-kind attractions;
- Build upon its existing relevance and positive identity to Salina residents;
- A place with both “the steak and the sizzle”, providing products, services and entertainment that are well matched to the Salina marketplace.

To fulfill the niche strategy for downtown, five different downtown development districts were identified, including:

- Santa Fe Avenue District: Shopping, dining and entertainment -- heart of the downtown “experience”
- Employment District: Primary job base to stabilize downtown
- Civic and Hospital Districts: Economic activity anchors for downtown
- Mill District: Adventurous and “edgy” link to Salina’s agricultural past

For each downtown development district, strategies are provided to reinforce each area’s sense of place, guide suggested uses and activities, overcome development challenges, capitalize on opportunity sites and link to other districts.

**The Overall Implementation Gameplan:** Given the preceding conclusions from the market-based plan, Part III provides the tools and strategies to guide downtown development over the next five to ten years.

The overall implementation strategy is one of **product development** – creating an environment that will nurture a use and activity mix to strengthen the “downtown experience” as a regional destination. We are suggesting that all agencies involved in downtown improvement efforts join in a concerted community effort to attract new businesses. Within the next three years the implementation gameplan is designed to create:

- Four to six new full service restaurants;
- Eight to ten new retailers following the “linear department store” strategy;
- Retention of downtown’s primary employers and the recruitment of at least one new major primary employer (more than 25 jobs) each year;
- Retention and growth of downtown existing anchors – the civic center and Salina Regional Health Center.

## **II. Suggested Roles and Responsibilities for Downtown Improvement Organizations**

To implement a “product development” gameplan for downtown, we are recommending the following roles and responsibilities for downtown improvement organizations:

### **Salina Downtown Inc./ Downtown Business Improvement District**

Two separate entities, Salina Downtown Inc. (SDI) and the downtown business improvement district (BID), are inextricably linked in their effort to market and manage downtown. SDI is a non-profit organization that represents businesses and property owners in efforts to improve the central business district. The BID generates a special benefit assessment that is paid by business and property owners to finance downtown improvement programs.

SDI has been a participant in the Kansas Main Street program for more than 20 years. Main Street is a national downtown improvement program that is preservation-based and utilizes a four-point approach to revitalization, including promotions, organization, design and economic restructuring. Statewide, downtown Salina is viewed as a successful Main Street program and the market, at about 50,000 persons, is larger than most Main Street efforts.

The BID has been in place since the early 1980s and currently generates about \$75,000 in annual assessment revenue for downtown improvement programs managed by SDI. According to its preliminary 2002 budget, the BID is expected to provide about 55% of SDI's operating revenue. Remaining sources include a City of Salina contribution (30%), Santa Fe Days (5%) and a variety of special projects and miscellaneous revenue (10%).

While most downtown stakeholders acknowledge the importance of SDI and the BID, we found that these entities are largely misunderstood and have not kept up with changes in the downtown marketplace. When established, both SDI and the BID were serving a downtown that was the region's primary retail destination. In the past 15 years, retail has declined and has been largely replaced by office, non-profit, arts and entertainment. Despite profound economic changes in downtown, the BID's benefit structure and assessment rates have remained the same since 1987. SDI and the BID are viewed as regulatory, better known for collecting assessments and managing design review processes, as opposed to marketing and improvement. Communication has also been inconsistent, with many downtown business and property owners uncertain of the services provided by these agencies or their relevancy to improving downtown.

**Recommendations:** We recommend a significant overhaul for both SDI and the BID – a change in priorities, work program and ways of doing business. Recommendations include:

- A redefinition of SDI and the BID's role to ***"downtown property manager"***. SDI and the BID would have the primary responsibility for creating and maintaining downtown as an environment to attract investment, requiring a realignment from a "preservation-based" approach (Main Street) to a more "market-based" approach (economic development).
- As downtown's property manager, SDI and the BID would focus on areas of business support, tenant recruitment and destination marketing. SDI becomes a "business support" agency, offering information and direct assistance, including an understanding of the downtown market, leasing cycles, financing and incentive options, code and design review processes, etc.
- SDI and the BID would streamline downtown marketing efforts, concentrating on efforts that package and promote downtown as a destination with a number of unique attractions. Unconventional marketing channels would be utilized, including the existing activity anchors of the city/county complex and the Salina Regional Health Center.

### **City of Salina**

The City of Salina has traditionally supported downtown improvement efforts as part of the community's overall economic development and quality of life enhancement goals. The City has several direct relationships with SDI and the BID, including the provision of an annual contribution for operating support and the subtraction of \$17,000 in BID funds to finance a portion of enhanced maintenance services. The relationship between the City and downtown appears to have remained cordial, yet stagnant, for several years.

**Recommendations:** We see a dual role for the City of Salina in helping to create the "downtown experience":

- First, we recommend a continuation of the City's supportive policies for a strong downtown. A vibrant downtown will help the entire Salina region better compete for new jobs and industries, providing a shopping, dining and entertainment attraction that differentiates the city.

We see the City's primary role as strengthening downtown's infrastructure – both the physical environment and the business climate that helps to attract new enterprises. Suggested improvements include a new signage and wayfinding system, pedestrian enhancements and connections, regulatory changes to guide new development, enhanced maintenance for downtown streets and incentives to help create desirable types of investment.

- Second, the City has a role and obligation as one of downtown's primary activity anchors. The civic center provides an effective channel to promote downtown to a variety of loyal user groups, including patrons of the public library and city/county

offices. As with any anchor activity, a recommitment to continue to centralize and grow city/county operations in downtown is important.

### **Salina Area Chamber of Commerce**

As the second largest Chamber of Commerce in Kansas, the Salina Area Chamber of Commerce offers an impressive array of economic development and marketing tools and services. Like most Chambers, the Salina Chamber is supportive of downtown growth and vitality, but it cannot promote downtown at the expense of other areas of the community.

**Recommendation:** We recommend that the Chamber participate as a “promoter” for downtown, assisting SDI to assemble market information and prepare marketing materials for downtown business retention and recruitment efforts. As downtown’s “property manager”, SDI/BID can identify specific locations for prospects that are interested in downtown and then provide “hand-holding” for small businesses that require assistance in navigating codes, financing incentives, design review, etc. The Chamber can help these businesses better understand the Salina marketplace and identify opportunities associated with a downtown location.

### **Salina Banks**

Lending institutions often have a role in downtown revitalization efforts by providing financing for business and development projects. The banks’ role is limited by lending constraints set by federal and state regulations – banks must ensure that clients are credit worthy and reduce risk to the lending institution.

**Recommendation:** The type of businesses that create the “downtown experience”, including restaurants, unique retail and entertainment, are generally not the most bankable types of uses. These uses often have inherent credit risks that may actually penalize a bank for financing them. To respect and be rewarded by conventional banking regulations and to encourage the sharing of risk in the downtown niche strategy, we recommend the creation of a downtown bank community development corporation (CDC) to facilitate a pooled lending approach. Through a bank CDC, many banks can invest in a loan pool that can be more flexible than conventional underwriting criteria plus help banks meet community lending goals.



### III. Recommendations for Moving Forward

A variety of tools are recommended to be utilized by the preceding agencies to help steer development in downtown Salina. These tools are clustered in the following categories:

- Economic development
- Regulatory climate
- Environmental improvements
- Destination marketing

Recommended program priorities, responsible agencies, estimated costs and a sequencing timetable are provided in the final section on pages 14 to 18.

#### **Economic Development**

**SDI as a Downtown Business Support Office:** SDI and the BID are recommended to be repositioned as a “Downtown Business Support Office”, providing a one-stop portal of information and assistance for businesses that might want to start, grow or relocate downtown. SDI becomes a “hand-holder and deal-maker”, helping to match businesses to the best locations and financing options, and providing assistance for businesses to navigate through code and design review processes. This effort would require:

- Strong relationships with property owners and businesses, including knowledge of available real estate, rental rates, lease expirations and expectations.
- Basic understanding of local real estate, finance and business development resources.
- Creation, maintenance and dissemination of a comprehensive business and property owner database.
- Ongoing liaison services with the city on codes, design review and other development processes.
- Program emphasis on business retention and recruitment, including marketing and support services to promote existing businesses and identify and recruit new enterprises.

**Downtown Investor Marketing Package:** SDI and the Chamber could develop a downtown investor marketing package that contains downtown market and real estate information. SDI could design a downtown marketing folder consistent with the overall niche strategy and work in concert with the Chamber to develop informational inserts. The Part I Competitive Analysis from this plan is suggested as a potential insert. Marketing packages should have the capability to be tailored to the needs of specific business prospects.

**Development Incentives:** Incentives can be useful to help guide desirable types of development. Specific opportunities for incentives identified in this plan include:

- Façade, signage and building restoration, particularly for properties in the Santa Fe and Mill Districts.
- Business development throughout downtown, with targeted retail, dining and entertainment uses in the Santa Fe District, primary employers in the Employment District and innovative retail and entertainment concepts in the Mill District.
- Major redevelopment sites, including the Lincoln/Roosevelt Schools, Phoenix Hotel and 300 block of South Santa Fe.

Several types of existing and new incentives are recommended to advance downtown development:

- **Property Tax Rebate:** This incentive is currently available through the City's Neighborhood Revitalization Program. It allows for a partial rebate on the increase in taxes resulting from approved property improvements. This incentive could be more aggressively marketed in the downtown area by SDI.
- **Tax Increment Financing (TIF):** TIF is an effective incentive to help revitalize blighted properties and districts. TIF allows for property and infrastructure improvements to be paid partially from future tax revenues resulting from the increased value created by new development. This incentive could be particularly helpful to advance development opportunity sites in the Employment District, including Lincoln/Roosevelt School, the Phoenix Hotel and the 300 block of South Santa Fe.
- **Property Improvement Revolving Loan Fund (RLF):** An RLF for property improvements, particularly to restore and/or stabilize historic buildings, facades and signs, could be a useful incentive. Salina has access to federal community development block grant financing that could be utilized to partially capitalize an RLF. An RLF could be used in the Santa Fe, Mill and Employment Districts.
- **Permit Fee Waivers:** The City should explore waiving permit fees for rehabilitation and development projects in downtown. Fee waivers could be applied to help promote desirable types of development, including retail, dining and entertainment uses in the Santa Fe District, primary employers in the Employment District and innovative retail and entertainment concepts in the Mill District.

If SDI evolves into a Downtown Business Support Office, it could become a central clearinghouse for information on incentives, providing direct assistance to businesses and property owners to apply for specific programs.

**Bank Community Development Corporation (CDC):** The "downtown experience" niche strategy relies on new and unique retail, dining and entertainment businesses -- business types may present credit risks to lenders. To participate in downtown revitalization

efforts, lenders in many communities in the nation have formed bank community development corporations (CDC) – entities that can provide loans and/or equity to businesses that might not meet conventional lending criteria. If formed as a CDC (a non-profit community organization), there are several regulatory advantages for lenders to invest, in addition to participation in a community revitalization effort. Our initial discussions with Salina lenders found that several of them are receptive to exploring this concept.

**Civic Facility Preference Policy for Downtown:** The Civic District, which includes city, county, state and federal offices, is one of two major activity anchors for downtown. As with any anchor, a long term commitment will boost confidence and stabilize the business climate. We recommend that the City of Salina and Saline County governments both adopt policies that create a “Downtown First” preference for future new civic facilities. While not obligated to consolidate all activities in downtown, the policy would require these agencies to evaluate downtown first for all new facility needs. It would also be a prudent policy for all Salina area taxpayers – creating cost efficiencies and maximizing the use of existing infrastructure.

**Downtown Housing:** We support a mix of living options in downtown, particularly in the upper floors of buildings in the Santa Fe and Mill Districts; however, downtown’s best supply of housing is found in its adjacent neighborhoods. Existing residential areas to the east, south and west of the central business district provide living options within a five to ten minute walk of downtown. We encourage policies to protect and improve these neighborhoods, including:

- Respect the boundaries of historic districts to the west and south of downtown (see “Regulatory Climate” for specific recommendations in the Hospital District).
- Explore housing development options in the river bend area east of downtown and west of Oakdale Park.
- Market available incentives, including the city’s property tax rebate, and investigate new housing rehabilitation loan funds for downtown neighborhoods. Federal community development block grants are a source for housing rehabilitation funds.

## **Regulatory Climate**

The regulatory climate is created by the rules and regulations that govern development in a downtown area. In general, regulations should aim to be clear to create an environment of certainty for an investor, flexible to accommodate a variety of use and business types and concise to help reduce time delays associated with development. We suggest the following revisions to improve downtown Salina’s regulatory climate:

- **Design Review Board:** Design review can be a critical tool to guide the restoration and rehabilitation of buildings and reinforce a downtown’s sense of place. While well intentioned, we found many property and business owners to be frustrated with the existing design review process. Concerns include a lack of consistency in the application of design review standards and a perception that many design review decisions create exorbitant costs.

We support several recent changes to the design review process, including management of the process by the City's Planning Department and the creation of revised design standards. We also recommend creating new criteria for at least two design review board members, requiring that one member be a real estate developer and/or contractor and that a second member be a real estate lender. Added to the board's existing requirement for an architect, the added expertise is suggested to ensure that design review decisions are coupled with knowledge of cost and financing implications on development projects.

- **Mill District Historic Designations:** We find the Mill District to have a rich collection of historic warehouses and mills that create a strong identity for downtown and a connection to Salina's agricultural history. We recommend that the City's Historic Preservation Board undertake the necessary research and evaluation that would result in a group designation of buildings in the area, including many of the outstanding warehouses in the vicinity of Elm Street and Santa Fe Avenue and the historically significant Lee Mill at Pine Street and Santa Fe. This evaluation should include an outreach and education effort to property owners, informing them of the incentives and benefits of formal historic designation. These benefits include eligibility for federal rehabilitation tax credits and the overall enhancement of the area's image that could improve its marketability for new investment.

The community's commitment to save these buildings today will preserve their future value for reinvestment. Future potential uses include loft housing, studios, restaurants and bars, a bed & breakfast hotel and offices. To assist property owners to preserve these buildings, the historic designations could be coupled with a revolving loan fund for building improvement and stabilization.

- **Hospital Zoning District:** The Salina Regional Health Center is one of downtown's two primary activity anchors. The Hospital accounts for more than 100,000 annual visitations and 1,000 highly skilled employees. To retain and guide the growth of this major activity anchor, we support the creation of a Hospital/Health Services zone as part of the city's zoning code. A hospital zone will provide a uniform planning area and create certainty for both the hospital and its adjacent neighborhoods. As part of a hospital planning area, we support:
  1. The integration of existing homes on the 7<sup>th</sup> Street cul de sac into the hospital. As described in the Part II description of the Hospital District in this plan, we support city intervention, if necessary, to assist the Salina Regional Health Center acquire these properties.
  2. A compromise solution to the hospital expansion pressures along Prescott Street. In this area, the hospital is encroaching upon an existing residential historic district. We urge a compromise solution that will preserve the residential scale of development for properties adjacent to existing homes. The one blighted home on Prescott that is now surrounded by hospital property, should be incorporated into the hospital expansion master plan and its future may include demolition. A compromise solution should include the

Salina Regional Health Center, the hospital foundation, the City and representatives of affected neighborhood groups.

3. The notion of expanding the hospital's planning horizon north along Santa Fe Avenue to include the 300 block of South Santa Fe. The shopping, dining and entertainment options within the Santa Fe District can be better supported by the hospital activity anchor by encouraging health services expansion to the north. The historic Masonic Temple should be protected if it is included in a hospital planning area.

- **Policies for Bars and Restaurants:** Many downtowns, including Salina, are finding that accommodating a diverse mix of uses can create neighbors that are not inherently compatible. During the summer of 2001, Salina policymakers were asked to help resolve conflicts between nightclubs and loft residents. The result was the creation of a conditional use permit that requires establishments serving alcohol to undergo special review and meet operational standards. This policy appears to be effective and we offer the following enhancements:
  1. Create a "Good Neighbor Policy" that establishes expected standards of operation and a dispute resolution process. Good Neighbor Policies have been adopted in mixed-use districts throughout the nation. They offer a voluntary and self-enforcing code of behavior and dispute resolution process. Good Neighbor Policies are also helpful to guide the design and operational planning for new dining and entertainment establishments. Denver's Lower Downtown provides an excellent working model for a Good Neighbor Policy that could be adapted to Salina.
  2. Use common sense in the conditional use permit process. Establishments that feature dining should be encouraged, while businesses that are predominately alcohol-oriented should undergo stronger scrutiny.
  3. To encourage new and innovative uses in the Mill District, we suggest that alcohol-oriented businesses be allowed as a use-by-right. The conditional use permit would apply in the remaining downtown zones.
- **Encourage Sidewalk Seating and Pocket Park Use:** In the Santa Fe District, we see strong potential for activating public spaces, including sidewalks and the pocket parks that were created in the late 1980s streetscape improvement effort. Criteria should be developed to encourage use of these areas while maintaining reasonable aesthetics, safety and design standards.
- **Explore Standards for Grain Clean-Up:** One of the most recurring nuisances for downtown stakeholders is pigeon waste. The source of much of this problem are the active grain storage and distribution operations in the Mill District. Grain spillage provides a constant food supply for the pigeons. In concert with the grain operators, the city should explore standards for minimizing grain spillage, both in the mills and in train cars that transport the grain out of downtown.

- **Santa Fe Historic District:** The notion of a Santa Fe Avenue historic district has been investigated before. It was not formed, in part, due to a lack of support among property owners. We suggest that the Santa Fe Avenue Historic District, contiguous with the Santa Fe Avenue planning district, be re-examined. We find that property owners are currently living with the regulatory constraints of a district (design review) without the benefits (tax incentives, marketing value). A formal historic district could help strengthen the overall appeal and image of downtown and is consistent with the use mix proposed for the Santa Fe Avenue District.

## **Environmental Improvements**

Environmental improvements are recommended to make downtown more attractive, pedestrian-friendly and easier to use. Most of the suggested improvements are inexpensive and capitalize on existing infrastructure.

**Pedestrian Crossing Signals:** Downtown needs pedestrian walk signals at key intersections. We recommend the following sequence if these signals need to be installed incrementally over time:

- Santa Fe District
- Connections from the Santa Fe District to the Hospital and Civic Districts
- Employment District

After five years, the desirability of pedestrian walk signals in the Mill District could be evaluated.

**Wayfinding/Directional Sign System:** Perhaps our most expensive capital improvement suggestion is the installation of a comprehensive wayfinding and directional sign system. Downtown is not directly accessible to major highways. Currently, wayfinding to downtown is virtually non-existent. Signs to major attractions are limited and inconsistent in design. There are no signs for the downtown patron, ranging from pedestrian directors to directional signs to parking lots.

We recommend that the City of Salina invest in a comprehensive wayfinding and directional signage system, including:

- Highway billboards
- Highway off ramps
- Wayfinding along major access roads
- Gateways at entries to downtown
- Directional signs to major attractions (i.e. civic center, library, hospital) and parking
- Pedestrian directories and kiosks

The signage system should be designed to embody downtown niche and project images consistent with downtown marketing materials. Wichita recently invested in a comprehensive wayfinding and signage system that provides an excellent, albeit more expensive, model.

**Decorative Lighting Enhancements:** There is considerable debate on the design of the pedestrian lights resulting from the late 1980s streetscape enhancements. We do not recommend replacing downtown lighting standards at this time; however, we did find many inexpensive ways to encourage decorative lighting consistent with the downtown niche strategy:

- **Building Outlines:** During the winter holiday season, buildings on Santa Fe Avenue were outlined by a simple strand of white lights. This strand could be retained year-round to help distinguish the Santa Fe Avenue District as a festive area.
- **Neon Business Signs:** We encourage the restoration of old and creation of new neon business signs. These signs provide a visible connection to the past plus provide visual excitement that is reflective of a shopping, dining and entertainment area.
- **Gateway Overpasses:** The pedestrian overpasses along Santa Fe Avenue provide opportunities to create decorative and exciting gateways. We encourage the City and SDI to explore the creation of distinctive gateway signs on the northern and southernmost overpasses.

**Parking Management:** To a varying degree, parking is problematic in virtually every downtown throughout the nation. Customers expect to park directly in front of their destination, and if not, immediately cite a “parking problem”. Our evaluation of Salina finds that the most immediate parking supply issue is for employees. Downtown is running out of available lots that can be allocated for large downtown employers. We contend that customer parking is relatively plentiful, but not particularly easy to find. Immediate parking management recommendations include:

- **Parking Signage:** As discussed in the prior “Wayfinding/Directional Signs” recommendation, we suggest that the city install directional signs to assist drivers to find off-street parking lots as part of an overall wayfinding system. Parking signs could also be improved for the lots themselves, perhaps utilizing a more recognizable or universal parking icon.
- **Discouraging Abuse of On-Street Parking Spaces:** We heard many stories of alleged abuse of on-street parking by employees and business owners. Downtown’s two-hour zones, particularly in the Santa Fe Avenue District, should be rigidly enforced. The city may want to explore escalating fines for repeat violators. Employees and owners could be encouraged to park in designated off-street lots as an alternative.

**Parking Plan:** Downtown could benefit from a formal parking plan that looks at demand and supply for the next ten years. Issues to be explored include options for expanding employee parking, management options for on-street parking, locations for future parking structures and financing tools for expanding parking, including various bonding mechanisms and the creation of a formal parking district.

**Maintenance – Defeat the Pigeons!:** Downtown stakeholders are annoyed by the ongoing maintenance challenge of pigeon waste. The pigeons are drawn to downtown by the excess grain that is spilled from grain elevators and transport trains in the Mill District.

In a prior recommendation, we have suggested that the City develop standards for clean-up at the source of the grain spillage. We also recommend the continuation of enhanced maintenance services along downtown sidewalks, particularly within the Santa Fe Avenue District. The City and SDI may want to explore the purchase of steam cleaning equipment that could assist in this effort.

**Public Art:** Public art can be an effective and relatively inexpensive way to make downtown business district more distinctive. We support the design and installation of public art throughout downtown, particularly in Santa Fe Avenue and Mill Districts.

**Linkage to Oakdale Park:** While within a five to ten minute walking distance of downtown, Oakdale Park is not formally connected to the central business district. We recommend that the City consider enhancing streetscape and landscaping along South and/or Mulberry Streets from Santa Fe Avenue to the Park to create a stronger physical connection. These connections would tie three downtown districts to the park, including the Hospital, Santa Fe Avenue and Employment Districts.

**Mill District Infrastructure:** As new private sector investment is attracted to the Mill District, the City should consider plans to improve basic infrastructure in the area. Within the next five years, the paving of Pine Street would be a priority improvement.

**Smoky Hill River Development:** While the Smoky Hill River winds through the eastern boundary of downtown, it is largely underutilized and serves a one dimensional purpose as a drainage channel. Many cities have successfully reconnected their downtowns to adjoining rivers through trails and paths and/or riverfront development. The City should consider a policy to encourage and leverage private sector development projects that aim to connect downtown to the river.

## **Destination Marketing**

The strength of downtown as an attraction is the sum of its parts – downtown has shops, restaurants and entertainment venues that collectively create the “Downtown Experience”. To promote downtown as a destination, we are recommending several cost-effective marketing tactics that capitalize on existing resources and activity anchors.

**Downtown Map & Directory:** We recommend that SDI redesign and update the downtown map and directory and then distribute it through a variety of marketing channels. The existing directory is in a newsprint format. We recommend that SDI consider redesigning the directory to a pocket-sized format produced on high quality glossy paper. The downtown map should clearly identify key attractions and parking. The design should be compatible with the “Downtown Experience” niche and consistent with downtown images being developed for the recommended gateways, wayfinding and directional sign system. Advertising could be sold in the directory to increase distribution. Suggested distribution channels include:

- Salina Regional Health Center
- City/County offices
- Downtown library



- Downtown post office
- Subscribers and patrons to downtown cultural institutions
- Downtown churches
- Salina area hotels
- Salina Area Chamber of Commerce
- Pedestrian directories within downtown
- Special events
- Kansas State University and Kansas Wesleyan University
- Central Mall

**Capitalize on Cross-Marketing Opportunities:** Downtown businesses and activity anchors share similarities in the regional pull of their markets. To illustrate this, we compiled a zip code analysis of four seemingly different downtown enterprises, including the Salina Regional Health Center, Martha & David's, Salina Community Theater and the Salina Journal newspaper. By mapping the zip codes of patients, customers, patrons and subscribers, similarities in the geographic trade area of these businesses emerge (Appendix). There are significant opportunities for cross-promotions within downtown, including:

- Distribution of downtown information and promotions within key activity anchors, including the Salina Regional Health Center, City/County offices and the downtown library.
- Cross-promotions among a variety of businesses that offer complementary products. Building upon the “linear department store” strategy suggested for the Santa Fe Avenue District, a variety of retail uses could be packaged together to demonstrate clusters of products available in specific categories (i.e. apparel, books and hobbies, dining and entertainment, etc.)

SDI could take a lead role in identifying and coordinating cross-promotional opportunities and then provide technical assistance to ensure that images and messages are consistent with the “Downtown Experience” niche strategy. SDI and the BID could offer to match financial participation by shops to leverage promotions.

**Special Events:** Special events can be an effective tool to attract visitors to downtown. Special events often have limited sales impact, but are useful to attract new markets and build return visitation. Special events are also labor intensive to produce, often draining energy and resources from downtown organizations. We suggest that SDI re-evaluate its current annual schedule of special events with the intent of building one or two strong signature events for downtown, leverage strong events produced by other organizations and eliminate events that do not meet production goals.

- **Santa Fe Days** should be developed into a stronger signature event for downtown. We did not witness this annual fall event, but many downtown stakeholders felt that Santa Fe Days had languished for many years. To revive this event, we suggest that Santa Fe Days reflect the emerging niche strategy for downtown – an experience that showcases shopping, dining and entertainment. The event should also be tied directly into Salina's rich agricultural history. It's fall timing could coincide with a harvest theme.

- **Smoky Hill River Festival** is an existing springtime event that attracts more than 80,000 persons to Oakdale Park. The event is consistent with downtown's niche strategy, showcasing live music and the arts. While a tremendous success for the city, it is our understanding that downtown currently does not capitalize on the River Festival. One idea is to create a connection along Mulberry Street, with painted pathways and flags that are typical of other entrances to the festival. This "pathway" could be further defined with booths and activities. SDI should explore ways to leverage this event by expanding activities from the Park to the Santa Fe Avenue corridor.
- **Prune Non-Performing Events:** We strongly urge SDI to eliminate events that do not meet set performance goals, including 1) Consistency with downtown's niche strategy; 2) Revenue generation (collectively, events should break-even or generate revenue) and 3) Ability to attract visitors, primarily from the local and regional Salina markets.

## IV. Sequencing Timetable

### Implementation Steps Recommended for Year 1

Step	Actions	Lead Agency/ Estimated Cost
<b>Economic Development</b>		
1. Reposition SDI as a Downtown Business Support Office	Change focus and work program of SDI and the BID	<u>SDI/BID</u> May require BID rate increase
2. Downtown investor marketing package	Develop a marketing folder and market information inserts	<u>SDI/Chamber</u> \$
3. Financial incentives to stimulate new investment	Market use of property tax rebate. Explore creation of RLF and fee waivers, TIF for large projects.	<u>City of Salina</u> \$ to \$\$\$\$
4. Bank CDC	Coordinate multiple lenders to create and capitalize CDC to provide business loans and/or equity.	<u>Downtown banks</u> \$\$\$\$
5. City and county downtown location preference policies.	Adopt policies to direct future location and growth of civic facilities and offices in downtown.	<u>City/County</u> None
<b>Regulatory Climate</b>		
1. Revamp composition of Design Review Board	Amend design review ordinance to add specific expertise to board	<u>City</u> None
2. Mill District historic designations.	Research and prepare historic designation ordinance for selected warehouses and mills. Educate property owners on benefits.	<u>City</u> None to \$
3. Hospital/Health Services Zone	Research and prepare a zoning designation to provide a defined planning area for the Hospital District	<u>City</u> None to \$
4. Policies for Bars & Restaurants	Create and apply a "Good Neighbor Policy" to set standards and expectations.	<u>City</u> None
5. Sidewalk Seating and Use of Pocket Parks	Market policies to encourage sidewalk seating and pocket park use in the Santa Fe Avenue District.	<u>City</u> None
6. Standards for Grain Clean-Up	Explore policies to encourage grain clean-up in the Mill District.	<u>City</u> None

### **Implementation Steps Recommended for Year 1 (continued)**

<b>Environmental Improvements</b>		
1. Pedestrian Crossing Lights	Install pedestrian crossing lights in Santa Fe Avenue District	<u>City</u> CIP budget
2. Wayfinding and Signage System	Design wayfinding and directional signage system for downtown	<u>City</u> \$\$ to \$\$\$
3. Decorative Lighting Enhancements	Encourage year-round building outline lighting in Santa Fe Avenue District	<u>SDI</u> \$
4. Parking Management	Form a task force to explore ways to discourage abuse of on-street parking	<u>SDI/City</u> None
5. Defeat the Pigeons!	Establish base level of enhanced maintenance services by the City. Explore purchasing steam cleaning equipment.	<u>City/SDI</u> \$ to \$\$

<b>Destination Marketing</b>		
1. Downtown Map & Directory	Redesign and publish the downtown map and directory.	<u>SDI</u> \$ to \$\$
2. Cross-Promotions	Distribute map & directory and other promotional material through activity anchors.	<u>SDI</u> None
3. Special Events	Create a special events plan that identifies opportunities for expansion, leverage and pruning.	<u>SDI</u> None

<b>Development Opportunities</b>		
1. 7 <sup>th</sup> Street Homes	Work with the Salina Regional Health Center to acquire 7 <sup>th</sup> Street cul de sac homes.	<u>City</u> None
2. Prescott Street Compromise	Work with the SRHC, Hospital Foundation and neighborhood residents to develop compromise solution to Prescott Street issues.	<u>City</u> None to \$\$\$
3. Roosevelt/Lincoln School	Work with the school district to plan for disposition of Roosevelt/Lincoln site, including feasibility analysis of Roosevelt re-use	<u>City</u> None to \$\$

#### **Estimated Costs:**

\$ = Less than \$10,000

\$\$ = \$10,000 to \$50,000

\$\$\$ = \$50,000 to \$100,000

\$\$\$\$ = More than \$100,000

### **Implementation Steps Recommended for Years 2 and 3**

<b>Step</b>	<b>Actions</b>	<b>Lead Agency/ Estimated Cost</b>
<b>Economic Development</b>		
1. Downtown Business Support Office.	Continue business retention and recruitment efforts.	<u>SDI/BID</u> \$\$\$ to \$\$\$\$
2. Downtown investor marketing package	Update marketing folder and market information inserts	<u>SDI/Chamber</u> \$
3. Financial incentives to stimulate new investment	Property tax incentives, RLF and fee waivers. TIF for large projects.	<u>City of Salina</u> \$ to \$\$\$\$
4. Bank CDC	Coordinate multiple lenders to create and capitalize CDC to provide business loans and/or equity.	<u>Downtown banks</u> \$\$\$\$
5. Downtown Housing Initiative	Review policies and identify incentives to strengthen housing preservation and development in adjacent neighborhoods.	<u>City/County</u> None to \$
<b>Regulatory Climate</b>		
1. Santa Fe Avenue Historic District	Explore the creation of a Santa Fe Historic District, including identification of financing and marketing incentives.	<u>City/SDI</u> None to \$
<b>Environmental Improvements</b>		
1. Pedestrian Crossing Lights	Install pedestrian crossing lights to connect the Santa Fe Avenue District to activity anchors in Hospital and Civic Districts.	<u>City</u> CIP budget
2. Wayfinding and Signage System	Install wayfinding and directional signage system for downtown	<u>City</u> \$\$\$ to \$\$\$\$
3. Decorative Lighting Enhancements	Design and install decorative lighting gateways on pedestrian overpasses in Santa Fe Avenue District.	<u>SDI/BID/City</u> \$\$ to \$\$\$
4. Parking Plan	Undertake a parking expansion study that identifies sites for structures and financing tools.	<u>SDI/City</u> \$\$ to \$\$\$
5. Public Art	Sponsor the design and installation of public art.	<u>SDI/BID/City</u> \$ to \$\$
6. Linkage to Park	Commission a design study to develop streetscape and landscaping of South and Mulberry Streets to create a link to Oakwood Park	<u>City</u> \$\$

**Implementation Steps Recommended for Years 2 and 3 (continued)**

<b>Destination Marketing</b>		
1. Downtown Map & Directory	Revise and publish the downtown map and directory.	<u>SDI</u> \$ to \$\$
2. Cross-Promotions	Assist downtown businesses to identify and capitalize on cross-promotions.	<u>SDI</u> \$ to \$\$
3. Special Events	Develop Santa Fe Days into a signature event for downtown; Create a strong link to the River Festival	<u>SDI</u> \$\$ to \$\$\$

<b>Development Opportunities</b>		
1. Roosevelt/Lincoln School	Implement re-use plan for Roosevelt/Lincoln schools	City/Private <u>Developer(s)</u> \$\$\$\$

**Estimated Costs:**

\$ = Less than \$10,000

\$\$ = \$10,000 to \$50,000

\$\$\$ = \$50,000 to \$100,000

\$\$\$\$ = More than \$100,000

### **Implementation Steps Recommended for Years 4 and Beyond**

<b>Step</b>	<b>Actions</b>	<b>Lead Agency/ Estimated Cost</b>
<b>Economic Development</b>		
1. Downtown Business Support Office?	Re-evaluate need for business support approach – Consider re-positioning to marketing/promotions.	<u>SDI/BID</u> \$\$\$ to \$\$\$\$
2. Downtown investor marketing package	Update marketing folder and market information inserts	<u>SDI/Chamber</u> \$
3. Financial incentives to stimulate new investment	Property tax incentives, RLF and fee waivers. TIF for large projects.	<u>City of Salina</u> \$ to \$\$\$\$
4. Bank CDC	Coordinate multiple lenders to create and capitalize CDC to provide business loans and/or equity.	<u>Downtown banks</u> \$\$\$\$
<b>Environmental Improvements</b>		
1. Pedestrian Crossing Lights	Install pedestrian crossing lights throughout the Employment District.	<u>City</u> CIP budget
2. Parking Plan Implementation	Explore construction of parking structure to satisfy growing employee and customer parking demands.	<u>City</u> \$\$\$\$
3. Public Art	Sponsor the design and installation of public art.	<u>SDI/BID/City</u> \$ to \$
4. River Development	Encourage and leverage projects that connect the river to downtown.	<u>City</u> None to \$\$\$
5. Mill District Infrastructure	Pave Pine Street	City: CIP budget
<b>Destination Marketing</b>		
1. Downtown Map & Directory	Revise and publish the downtown map and directory.	<u>SDI</u> \$ to \$
2. Cross-Promotions	Assist downtown businesses to identify and capitalize on cross-promotions.	<u>SDI</u> \$ to \$
3. Special Events	Develop Santa Fe Days into a signature event for downtown; Create a strong link to the River Festival	<u>SDI</u> \$\$ to \$\$\$
<b>Development Opportunities</b>		
1. Phoenix Hotel	Evaluate opportunities for Phoenix Hotel to be developed into parking and mixed uses.	<u>City/Private Developer(s)</u> \$\$\$\$

## **ZIP CODE ANALYSIS – FOUR SALINA BUSINESSES**

*Martha And David, Inc., Salina Community Theater, Salina Regional Health Center and the Salina Journal*

The four businesses share strong constituencies in Lindsborg and McPherson to the south, Concordia and Minneapolis to the north, Abilene and Junction City to the east, and Ellsworth to the west.

**The eastern and southern thirds of the state appear to be largely untapped** by all of the businesses, with the exception of Martha and David's, which draws customers from Wichita to the south, as well as Topeka and Lawrence to the east.

Martha and David's second largest markets appear to be Abilene and Manhattan, east of Salina. The retailer seems to have the broadest pull throughout the state of Kansas of the four businesses.

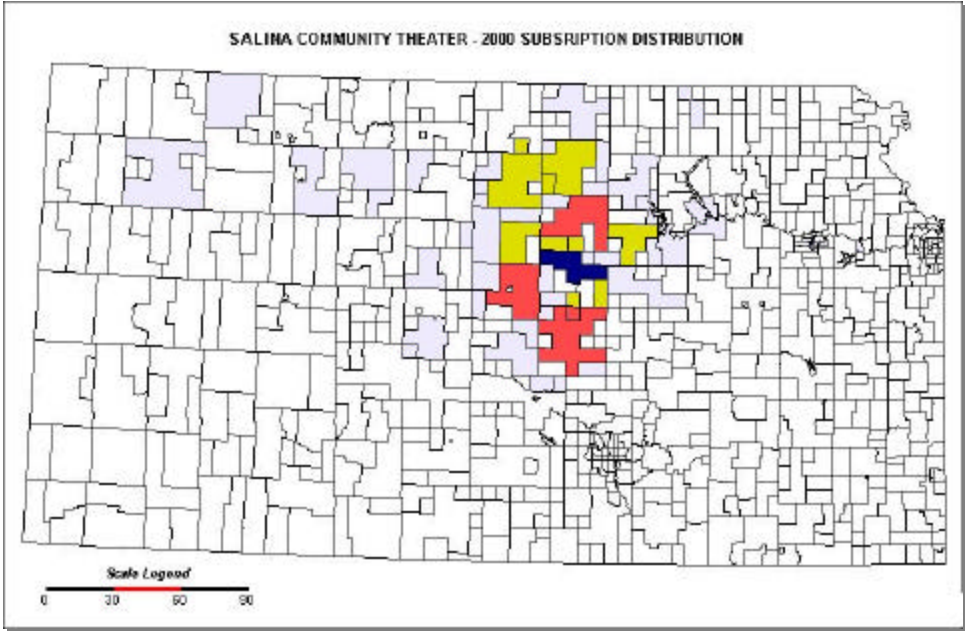
The Salina Community Theater, Salina Journal and the Salina Regional Health Center draw primarily from north and west of Salina, to Marysville on the northeast and Marion on the southeast.

The Salina Journal, which has the largest customer base of the four businesses (33,400+) draws subscriptions from the north and west borders of the state. Minneapolis and Concordia to the north, Abilene to the east and Lindsborg to the south are also heavy subscribers to the Journal.

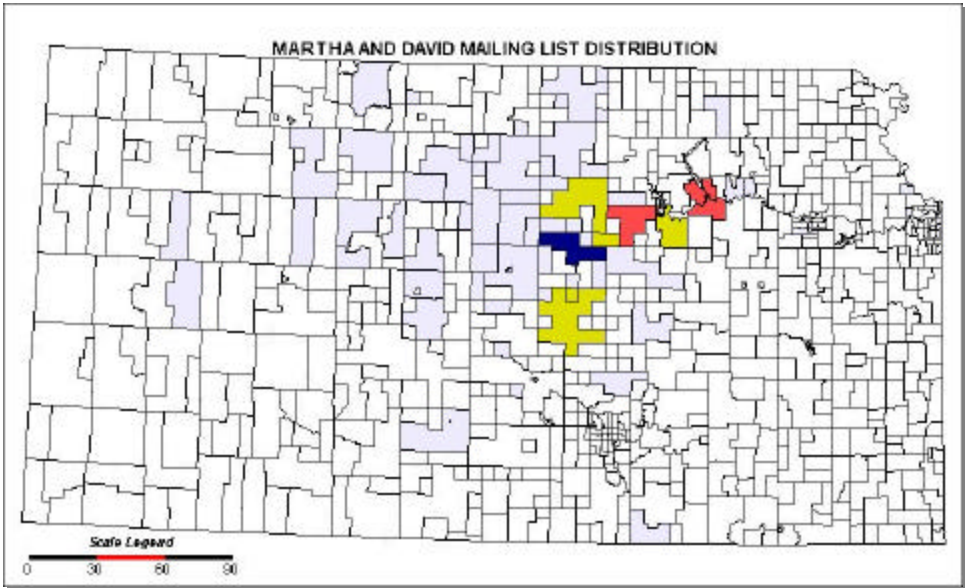
Salina Regional Health Center admits the majority of its patients from a core area that stretches 30 miles east to Abilene, 60 miles north to Concordia, 40 miles south to McPherson, and 40 miles east to Ellsworth. A secondary ring of admissions extends north to the state border and west to Hays.



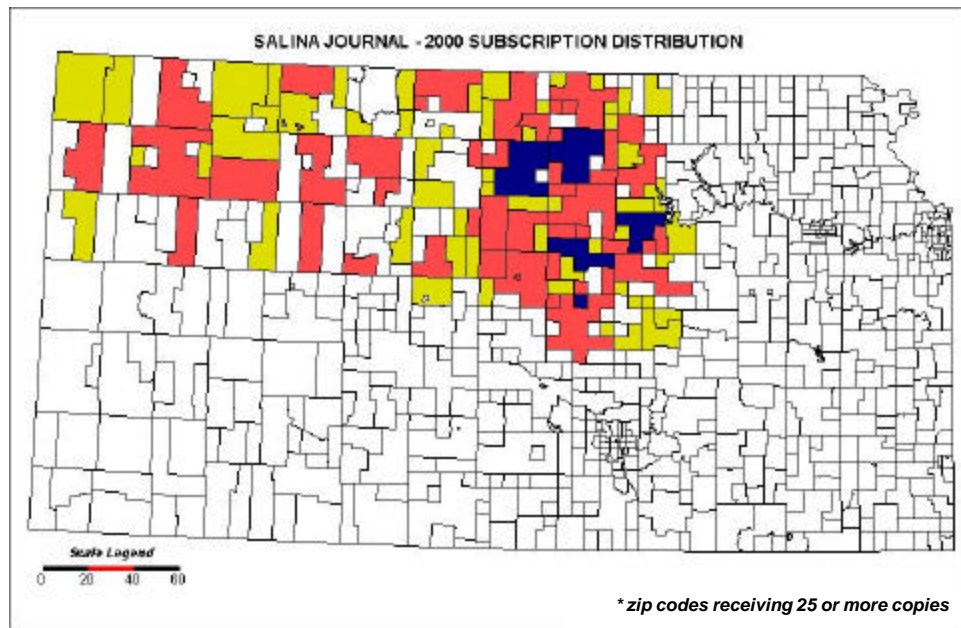
ZIP CODE DISTRIBUTION – FOUR SALINA BUSINESSES



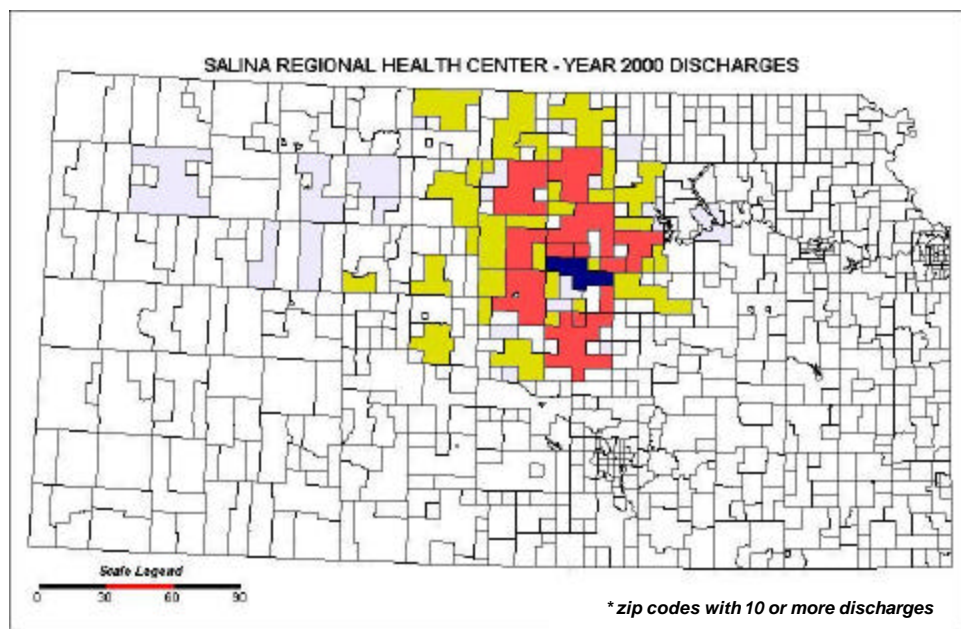
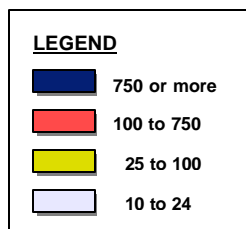
1,707 subscriptions



928 mailings



33,424 distributed



10,983 discharges

